

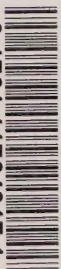
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HUMAN RESOURCES STUDY OF THE CANADIAN



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DETAILED REPORT

HUMAN RESOURCES STUDY OF THE CANADIAN ACCOMMODATION INDUSTRY



D E T A I L E D R E P O R T

Prepared by KPMG,
in association with Abt Associates of Canada and Mana Research Ltd.,
for the Steering Committee of the Human Resources Study of the
Canadian Accommodation Industry.
Fall 1995



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Like the Steering Committee itself, those who contributed to the process—through interviews, focus groups and completion of surveys—represent a broad cross-section of the accommodation industry. Our final thanks and appreciation is extended to those numerous accommodation business owners and managers, educators, students, union officials, government representatives and most importantly, employees, who so willingly gave their time for this important study.

The Steering Committee truly believes the findings contained throughout this report, and the recommendations detailed in Chapter VI, provide a strong basis for furthering the role of human resources development in the Canadian accommodation industry.



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CONTENTS

I INTRODUCTION

A. Objectives of the study	1
B. Definition of the industry	1
C. Approach and methodology	2

II THE CURRENT SITUATION

A. Overview	3
B. Size and scale of the accommodation industry	4
C. Key issues	6
D. An international perspective	16
E. Summary	17

III EMPLOYMENT STRUCTURE OF THE INDUSTRY

A. Size	19
B. Labour force characteristics	21
C. Occupational breakdown	25
D. Part-time versus full-time work	26
E. Employment growth	31
F. Skill levels	33
G. Summary	35

IV HUMAN RESOURCE ISSUES

A. Establishing the need for better human resource practices	37
B. Perceptions of the industry	39
C. Turnover	43
D. Staffing	46
E. Education and training	47
F. Career paths	52
G. Industry co-ordination and support	54
H. Language, cultural and gender issues	55
I. The role of organized labour	57
J. Technology	58
K. Summary	59

V CASE STUDY ANALYSIS

A. Literature search	61
B. Canadian case studies	65
C. Australia	66

VI RECOMMENDATIONS

A. Overview	69
B. Detailed recommendations	70
C. Conclusion	76

APPENDICES	A-1
A Members of the Steering Committee	A-3
B List of Interview, Focus Group, and Case Study Participants	A-7
C Case Study Summaries	A-11
D Current Status of Occupational Standards and Certification in Canada	A-31
E Detailed Labour Force Data and Tables	A-33
F Listing of Accommodation and Tourism Programs at Canadian Educational and Training Institutions	A-39
G Hotel Associations - National, Provincial, Territorial	A-57
H Tourism Education Councils - National, Provincial, Territorial	A-59
I Study Team	A-61
GLOSSARY	A-62
BIBLIOGRAPHY - PERIODICALS, REPORTS	A-63

I INTRODUCTION

A. OBJECTIVES OF THE STUDY

The accommodation sector is an integral part of the Canadian tourism infrastructure generating about \$5 billion (18%) of Canada's tourism GDP in 1994.



As the global tourism industry becomes more competitive and the Canadian accommodation industry recovers from a debilitating recession, concerns about the future of the industry are being expressed by various industry participants, ranging from hoteliers to regional accommodation associations and the Hotel Association of Canada. In response to concerns raised by the Hotel Association of Canada, the Sector Studies Directorate of Human Resources Development Canada commissioned a study of the human resource issues and challenges facing the Canadian accommodation industry. A consortium of three consulting firms—KPMG, Abt Associates and Mana

Research Ltd.—undertook this comprehensive industry study. The study was under the direction and guidance of an accommodation industry stakeholder-led Steering Committee that consisted of representatives of chain and independent hotels from across Canada, the Hotel Association of Canada, several provincial hotel associations, the Canadian Tourism Human Resource Council, labour organizations, educational institutions and the federal and provincial governments. A list of members is provided in Appendix A.

The objectives of this study were to:

- Assess the present and future business environment of the accommodation industry.
- Assess the nature and structure of employment including the potential for employment growth.
- Inventory current human resource practices and assess human resource planning.
- Identify new technology and examine the impact of technology now and in the future.
- Identify current accommodation industry human resource practices in other countries that may be applicable to Canada.

- Synthesize the information and issues into a list of recommendations and follow-up activities endorsed by all Steering Committee members.

B. DEFINITION OF THE INDUSTRY

The provision of accommodation may appear to be a relatively uniform service. However, the Canadian accommodation industry is diverse, ranging from small, limited-service motels to major urban hotels with 1,000 or more rooms and extensive food and beverage, meeting and related facilities. In addition to commercial hotels and motels, a variety of other accommodation facilities operate in Canada. According to the Standard Industrial Classification System, the accommodation services industry (Major Group 91) consists of four major sub-categories, specifically:

- SIC 911—Hotels, motels, and tourist courts.
- SIC 912—Lodging houses and residential clubs.
- SIC 913—Camping grounds and trailer parks.
- SIC 914—Recreation and vacation camps.

SIC 911 accounts for more than three quarters of employment and economic activity in the broader accommodation services industry. This category includes:

- | | |
|---------------------------|----------------------------------|
| • hotels | • resorts |
| • suite hotels | • spas |
| • motor hotels/motor inns | • guest houses/
tourist homes |
| • motels | |
| • inns/lodges | • bed and breakfasts |

Given the significance of SIC 911, this category is the primary focus of this study. However, some transfer of employment will inevitably occur within and between categories (e.g., a chef moving from a residential club to a hotel dining room). Therefore despite the lack of qualitative research directed to SIC's 912, 913 and 914, references in this report to the "accommodation industry" are taken to mean Major Group 91 except where differences between SIC 911 ("hotels/motels") and SIC's 912, 913 and 914 ("other accommodation") are specifically identified. For example, Chapter III—Employment Structure of the Industry—contains a detailed breakdown of the demographic and related characteristics of each of these two sub-groups.

C. APPROACH AND METHODOLOGY

The purpose of the study was to prepare prescriptive recommendations based on a complete analysis of human resource issues in the Canadian accommodation industry. During the first Steering Committee meeting, the participants agreed that the final report should identify a concise number of implementable recommendations that would have a significant impact on human resource development practices in the accommodation industry.

All of the analysis undertaken for the study was completed in the fall/winter of 1994/1995. In order to achieve the objectives, a variety of research techniques were used. Interviews and focus groups were used extensively to collect comments and opinions on the current state of accommodation human resource practices. During the field work phase of the study, more than 65 interviews were held with key stakeholders (e.g., hotel owner/operators, labour, educators, industry associations, employees, students). In addition, eleven focus groups with more than 75 students and employees at various hotels and educational institutions were held across the country. Numerous telephone interviews were also conducted. A list of all interviewees and focus group participants is included in Appendix B.

Case studies of six Canadian accommodation facilities in various locations across the country were conducted to permit first-hand investigation of the human resource challenges facing the industry and to profile specific human resource practices. Further, tourism consultants in KPMG's Adelaide and Sydney, Australia offices conducted a case study of the Australian accommodation industry to identify human resource development, education, training and related trends for the purposes of comparison to the Canadian situation. A list of case study subjects is also included in Appendix B. The write-ups for individual case studies are contained in Appendix C.

In addition to personal interviews, KPMG conducted a thorough literature search that focused on various trends, statistics and background data. In order to provide insight into the nature, size and growth potential of the industry, a thorough labour market analysis based on Statistics Canada's 1991 Census data was conducted.

Following the completion of these steps, the Steering Committee directed the synthesis of the research, developed and jointly agreed upon a set of recommendations, and guided production of the report that follows.

II THE CURRENT SITUATION

This chapter presents an overview of the tourism and accommodation industries, discusses the size and scale of the accommodation industry, and describes some critical issues affecting the industry.

A. OVERVIEW

The accommodation industry is an integral component of the tourism industry. Virtually all initiatives undertaken by the tourism industry have an impact, either directly or indirectly, upon the accommodation industry. The reverse is also true, as Canada's ability to remain a leading global travel destination is greatly influenced by the strength of its accommodation industry.

Tourism is recognized as one of the fastest growing industries in the world economy and is a significant contributor to the Canadian economy.

The Canadian Tourism Commission estimates that tourism contributed \$28 billion to Canada's Gross Domestic Product in 1994.

Canada continues to be a leading international destination, attracting over 15 million overnight visitors from abroad in 1993—a 17% increase from the number of international visitors in 1980. This increase in the number of international visitors, while impressive, did not keep pace with the overall growth in international travel which increased by 76% during the same period. As a result, Canada went from the sixth most popular global destination to tenth place in the rankings. In terms of tourism receipts, Canada has more or less maintained its international ranking, falling one position from tenth highest international tourism receipts in 1980 to eleventh in 1993. Exhibit II-1 details the top eleven international destinations in 1993.

Exhibit II-1
Arrival of overnight tourists from abroad

Country	Rank	1993		Rank	1980	
		No. of Tourists (000)	Tourism Receipts (US\$ million)		No. of Tourists(000)	Tourism Receipts (US\$ million)
France	1	60,100	23,410	1	30,100	8,235
U.S.A.	2	45,793	56,501	4	22,500	10,058
Spain	3	40,085	19,425	2	23,403	6,968
Italy	4	26,279	20,521	3	22,087	8,213
Hungary	5	22,802	1,181	10	9,413	504
U.K.	6	19,400	12,256	7	12,420	6,893
China	7	18,982	4,683	N/A	3,500	555
Austria	8	18,257	12,566	5	13,879	6,442
Mexico	9	16,534	6,167	8	11,945	5,393
Canada	10	15,105	5,897	6	12,876	2,264
Germany	11	14,348*	10,509	9	11,122	6,566
E. Germany		N/A			1,523	
Total		499,620			284,309	

*Includes East Germany.

Source: World Tourism Organization.

B. SIZE AND SCALE OF THE ACCOMMODATION INDUSTRY

The accommodation industry in Canada—specifically SIC 911—is comprised of a spectrum of business enterprises ranging from small bed and breakfast and guest house operations to full service urban hotels. The number and type of fixed-roof accommodation offered varies considerably by province. The greatest concentration of large full-service hotels is in major cities or resort areas. The majority of Canadian hotels/motels are independent operations (i.e., not affiliated with a chain)—the opposite of the situation in the United States.

1. Characteristics of accommodation facilities

The industry is far from homogeneous due to variances in operating structures and characteristics. Some of the key variances include:

- Location—urban versus non-urban.
- Seasonality—in occupancy levels or in length of operating season.
- Size—number of guest rooms, number of food and beverage outlets, number and size of meeting facilities.
- Services provided—guest rooms only, beverage focus, full service.
- Labour—unionized versus non-unionized.
- Ownership—franchise-affiliated or independent.
- Management—multi-property, international management company, or independently managed.
- Ownership structure and financial strength—of particular note is the current number of accommodation businesses owned (or controlled) by financial institutions, who may be unwilling to invest additional dollars in these non-performing assets.
- Level of computerization.

In comparison to other international destinations, the Canadian industry is most similar to the United States accommodation industry, although distinct differences do exist (e.g., Canada has a lower level of chain affiliation). The similarity results from the prominence of U.S.-based hotel chains operating in

Canada and the number of U.S. tourists entering the country on an annual basis.

An exact inventory of accommodation supply in Canada is difficult to obtain due to the abundance of small (i.e., 1 - 5 units) guest houses or bed and breakfasts in the industry.

According to the most recent Statistics Canada "Traveller Accommodation Statistics," there were a total of 15,571 accommodation facilities in Canada in 1991. SIC 911 comprised the majority of accommodation facilities with 5,374 hotels/motor hotels and 4,197 motels. The remaining accommodation facilities (5,964) were classified as other accommodation facilities (i.e., SIC 912 to 914).

Based on information provided by provincial ministries and provincial hotel associations, a partial breakdown of accommodation units by type and by province is presented in Exhibit II-2. While the Exhibit is not complete, it does provide some insight into the variances of size and scale on a regional basis.

2. Independents, chains and affiliations

As mentioned previously, the majority of hotels/motels in Canada are not affiliated with a chain and operate instead as independents. Another Statistics Canada publication—"Traveller Accommodation Industries—A Report on the 1993-94 Survey"—reports that 77% of hotels and motor hotels and 64% of motels in Canada are not affiliated with a chain or franchise group. The opposite is true in the United States where the majority of hotels/motels are affiliated with a chain or franchise group.

The key differences between "branded chains" and "management companies" are worth highlighting. Typically, a branded chain is similar to a franchise company as it offers the hotel owner an identification package (e.g., signage), a reservation system and support materials (e.g., accounting systems, training modules). Large branded chains include Sheraton, Best Western, and Travelodge. Management companies—which may operate in conjunction with a branded chain—offer full on-site management of an hotel. A management company may control the rights to a branded chain in a given geographic area

and, as a result, may offer a combined service of management and branded affiliation. Examples of the latter include Delta, Westin and Four Seasons. Full or partial ownership of hotels by management companies and/or branded chains is becoming less common. In Canada, Canadian Pacific Hotels &

Resorts is probably the largest, fully-integrated owner/manager of hotels. A more common approach is for various hotel owners to engage management companies and/or branded chains on a contract basis.

Exhibit II-2

Supply of fixed-roof accommodation for select provinces—by type/size

Province/Territory	Total No. Properties (No. Rooms)	Hotels, Motels, Resorts, Inns, Apt. Hotels	Lodges, Cabins, Cottages, Bungalows, Vacation Rentals	Bed & Breakfast, Other
Newfoundland	345 (12,871)	127 (4,670)	52 (667)	166 (600)
Nova Scotia	675 (12,871)	290 (11,009)	129 (931)	260 (931)
New Brunswick	469 (10,158)	251 (9,204)	50 (373)	168 (581)
PEI	734 (5,246)	87 (2,660)	357 (1,522)	290 (1,064)
Quebec ¹	2,247 (67,565)	437 (47,242)	1,500 (19,393)	310 (930 est.)
Ontario ²	3,776 (120,227)	535 (78,514)	1,525 (32,583)	1,716 (9,130)
Manitoba	536 (12,000)			
Saskatchewan	683 (17,456)			
Alberta	884 (49,624)	662 (45,807)	58 (3,007)	164 (810)
British Columbia	2,290 (70,400)	1,424 (58,498)	574 (8,784)	294 (3,118)
Northwest Territories	104 (1,702)	72 (1,521)	9 (92)	23 (89)
Yukon	111 (2,573)			30 (90 est.)

Source: Provincial ministries and provincial hotel associations.

¹Accommodation facilities with over 40 rooms grouped under "Hotels, Motels, Resorts, Inns, Apartment Hotels"; accommodation facilities with between 5-39 units grouped under "Lodges, Cabins, Cottages, Bungalows, Vacation Rentals." Only Bed & Breakfast properties that are members of the Bed & Breakfast Association of Quebec are reported.

²Accommodation facilities with over 50 rooms grouped under "Hotels, Motels, Resorts, Inns, Apartment Hotels"; accommodation facilities with between 11-50 units grouped under "Lodges, Cabins, Cottages, Bungalows, Vacation Rentals"; accommodation facilities with between 1-10 rooms classified as "Bed & Breakfast, Other."

Chains and management companies have a significant impact on the industry as they generally operate larger properties, may enjoy higher awareness with the travelling public (especially international travellers), may be more sophisticated and/or innovative in their management practices, and generally have more formal human resource practices. Most of the large chains in Canada have a national presence. Exhibit II-3 lists the fourteen largest management companies/chains in Canada—twelve operate in four or more provinces.

Many large international hotel chains operate in Canada. Because these chains tend to have high public awareness, they serve to further raise the profile of the industry with travellers, the labour force, and the business community. The greatest concentration of full-service, international, chain-

managed hotels are in major cities. Exhibit II-4 lists the location of a select number of full-service, chain-managed hotels.

C. KEY ISSUES

A variety of trends and broader economic issues will continue to have major implications for the industry and, by extension, its human resource practices and capabilities.

1. Financial performance

The recession of the early 1990s had a significant negative impact on the industry. According to Statistics Canada and Canadian Tourism Research Institute (CTRI) data, the accommodation industry's GDP decreased by 5% between 1990 and 1993. The recession caused a decline in both leisure and

Exhibit II-3

The fourteen largest management companies and branded chains—ranked by number of hotels in Canada

Chain	Total No. Hotels (No. Rooms)	Atlantic Canada	Quebec	Ontario	Manitoba/ Saskatchewan/ Alberta	British Columbia
Choice Hotels International	188 (17,472)	22 (1,615)	37 (3,720)	94 (8,957)	22 (1,817)	13 (1,363)
Best Western International	127 (12,838)	15 (1,066)	6 (734)	43 (4,755)	20 (2,448)	43* (3,835)
Travelodge/Royco	70 (8,206)	4 (339)	4 (607)	26 (3,477)	20 (2,675)	16 (1,108)
Holiday Inns of Canada	60 (11,489)	8 (1,069)	9 (2,551)	25 (5,031)	9 (1,713)	9 (1,125)
Days Inns	42 (4,082)	1 (54)	6 (605)	29 (2,964)	2 (133)	4 (326)
Howard Johnson/ Accommodex Franchise Mgmt.	37 (4,796)	8 (672)	2 (420)	22 (3,164)	3 (333)	2 (207)
Ramada Franchise Canada	30 (5,166)	1 (178)	3 (600)	17 (3,019)	5 (953)	4 (416)
Atlitic Hotels & Resorts	29 (3,767)	8 (839)	—	16 (2,078)	2 (409)	3 (441)
Commonwealth Hospitality	27 (6,079)	1 (232)	4 (982)	18 (4,041)	2 (492)	2 (332)
Canadian Pacific Hotels & Resorts	24 (10,556)	5 (1,364)	3 (1,863)	4 (2,473)	8 (2,996)	4 (1,860)
Chaine Hôtelière Hôte	24 (2,362)	—	24 (2,362)	—	—	—
Delta Hotels & Resorts	22 (7,088)	6 (885)	4 (918)	5 (2,781)	4 (1,066)	5 (1,438)
Sandman Hotels & Inn	19 (1,893)	—	—	—	3 (588)	16 (1,305)
ITT Sheraton	18 (6,570)	2 (576)	3 (1,198)	9 (3,687)	3 (829)	1 (280)

Source: 1995 Hotel & Motel Systems Directory, Hotel Association of Canada.

*Includes Yukon property.

Note: Affiliations change with increasing regularity.

business travel and resulted in fierce rate competition among hotels. Decreases in both room and food and beverage revenue had an adverse impact on the industry's financial performance and resulted in a significant restructuring of its capital base. Increases in property taxes in major Canadian cities have also had a negative impact on the industry's financial strength.

The sagging financial fortunes of the Canadian accommodation industry has resulted in a large number of layoffs, deterioration of facilities (i.e., lack of spending on renovations), changes in ownership (i.e., growing control by major financial institutions due to owners not being able to service debt) and a tendency to compete on a "price" basis (i.e., heavy

rate discounting that has eroded profit margins). The financial situation over the last few years has tended to reinforce negative stereotypes of employment in the industry as non-profitable, a poor career choice and highly transient in nature.

In 1994, the industry began to show signs of recovery. Industry experts predict a return to an equilibrium in the demand for, and supply of, accommodation in most markets. This equilibrium should result in a return to profitability in the near future. The basis for this optimism includes rising occupancy levels, which have recovered strongly in some markets (e.g., Toronto) and rising average room rates.

Exhibit II-4

Location of selected full-service, international, chain-managed hotels in Canada (1994)

Chain	Location	Chain	Location
Four Seasons Hotels & Resorts	Toronto (2) Vancouver	Novotel Canada Inc.	Montreal (2) Toronto (4) Ottawa Windsor
Hilton International	Saint John, NB Montreal (2) Quebec City Toronto (2) Windsor Edmonton	Radisson Hotels	Montreal Quebec City London Ottawa Toronto (3) Winnipeg Regina Calgary Minaki
Hotel Inter-Continental	Montreal Toronto	Westin Hotels & Resorts	Montreal Ottawa Toronto Winnipeg Calgary Edmonton Vancouver
Marriott Hotels & Resorts	Toronto (2)		

Source: 1995 Hotel & Motel Systems Directory, Hotel Association of Canada, KPMG research.

In May 1995, CTRI analyzed 16 Canadian markets (i.e., provinces and major cities). CTRI forecasts that in 1995, eleven of these markets will have higher occupancy levels (i.e., increases of 1-2 percentage points), three markets will stay the same, and two markets will have lower occupancy levels (i.e., decreases of 1 percentage point). CTRI forecasts that in 1995 occupancies in the eleven major Canadian cities will range from 58% to 70%, with Vancouver having the highest occupancy level.

Rising occupancy levels—particularly those in major cities such as Toronto—should produce increases in average room rates in the short term. Increases in average room rates over the past few years have not kept up with inflation as shown in Exhibit II-6.

The Conference Board of Canada's long-term forecast shows that the accommodation and food industry will experience an annual growth in GDP of approximately 3% between 1995 and 2015 as illustrated in Exhibit II-5. Annual growth is forecasted to range from a high of 3.5% (1998) to a low of 2.6% (2004). During this period, hotel operators will not

experience the tremendous growth of the late 1980's. The Conference Board of Canada notes that much of the current growth is due to the low Canadian dollar—this type of advantage is susceptible to sudden change (as happened with the Mexican peso in late 1994).

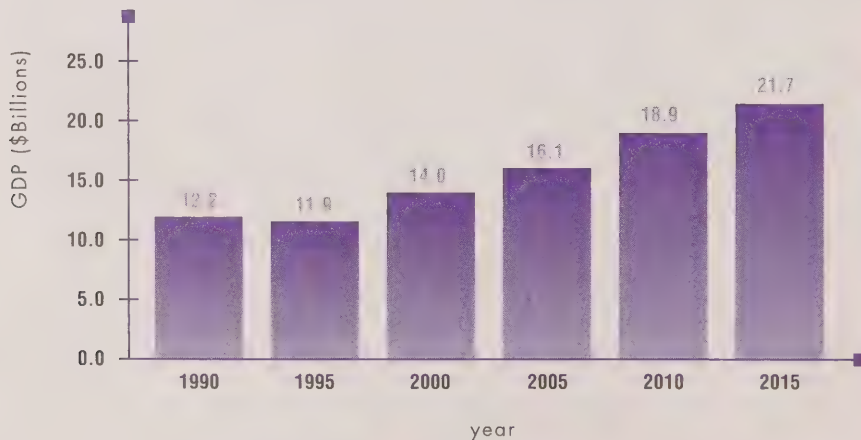
2. Hotel development and transactions

The cyclical nature of hotel development should be taken into account when reviewing the figures presented in Exhibit II-6 and II-7. Rising occupancies and average room rates, combined with the long lead time required to construct new hotel facilities, could result in a shortage of hotel rooms at peak times of the year in certain cities (e.g., Vancouver, Toronto) and some resort areas (e.g., Whistler, Mont Tremblant).

According to industry experts, the majority of new development is expected to occur in select resort areas (e.g., Whistler, Mt. Tremblant). New development in major urban centres is unlikely to occur over the short term (e.g., 2-3 years), except in a few high demand markets such as Vancouver.

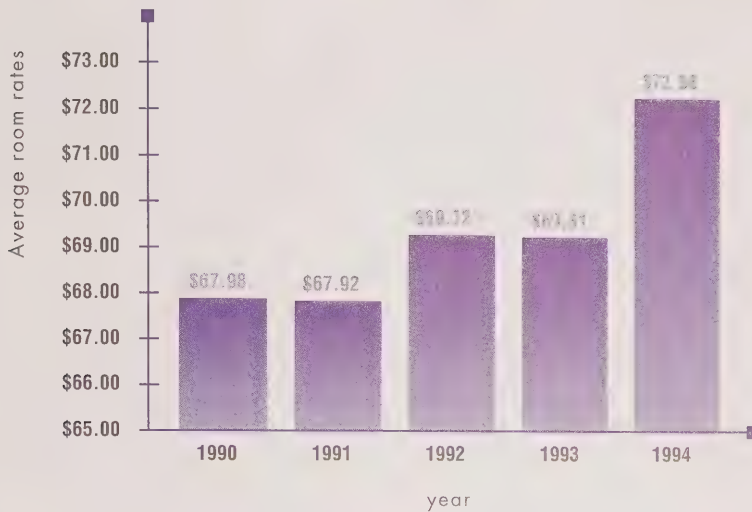
Exhibit II-5

GDP for the Canadian accommodation and food industry-(\$1986)



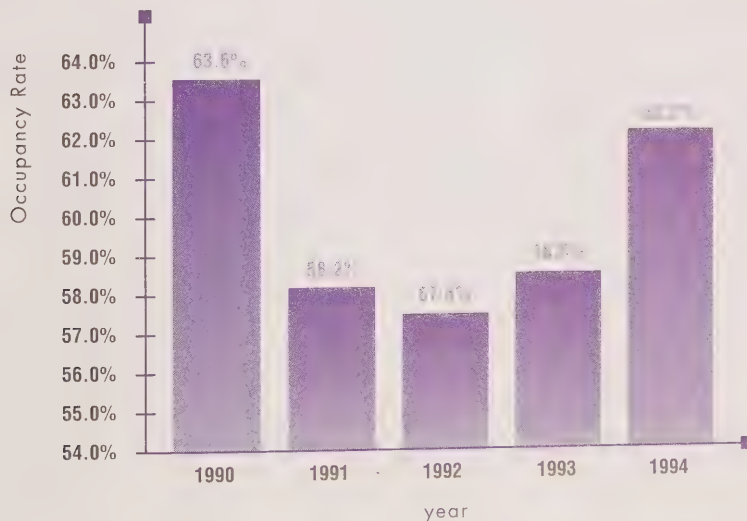
Source: Conference Board of Canada, March 1995.

Exhibit II-6 Average room rates-all Canadian markets



Source: Hotel Association of Canada and Price Waterhouse/Smith Travel Research.

Exhibit II-7 Occupancy rates-all Canadian markets



Source: Hotel Association of Canada and Price Waterhouse/Smith Travel Research.

Instead, hotel owners are expected to look at renovation/restoration budgets to enhance some "tired" facilities in recession-affected marketplaces.

Exhibit II-8 details a sample of hotel sales in Canada during the first five months of 1995. The number of transactions has increased in the last three years. For example, Hotel Valuation Services reported that the total dollars invested in acquiring Canadian hotels more than doubled between 1992 and 1993. In 1994, the number of sales transactions continued to increase. Recent hotel sales show that offshore interest remains high in selected Canadian hotels (particularly in Western Canada)—Canadian investors are more active in Eastern Canada.

In the United States many troubled properties have traded hands in recent years. In Canada, the level of activity has been much lower due to the reluctance of Canadian lenders to formally realize losses in

depressed markets. As the economy and transaction values improve, these financial institutions may be more interested in disposing of troubled hotels.

3. International competition

The tourism industry's global orientation is expected to continue both in supply of accommodation (i.e., chains broadening their geographic base of operations) and demand (i.e., increasing international travel). Global expansion will likely see Canadian operators continue to increase their geographic base of operations outside Canada. Canadian companies may expand through management contracts, new development or acquisitions. International operators will increase their Canadian presence through new development and the continued merger and acquisition of ownership companies. This increased exposure to the global market (e.g. increased awareness of "best practices" in other countries,

Exhibit II-8 Recent hotel transactions

Hotel	Location	Transaction Date	Rooms	Selling Price (\$Million)	Selling Price Per Room	Purchaser
Valhalla Inn Markham	Toronto	May 1995	202	\$12.4	\$61,386	Ismaili
Best Western Carlton Plaza	Victoria	May 1995	103	\$6.1	\$59,223	Ismaili
Chimo Hotel Markham	Toronto	April 1995	292	\$12.6	43,151	American
The Millcroft Inn	Alton	April 1995	52	\$3.25	62,500	European
Best Western Chelsea	Coquitlam	April 1995	61	\$4.3	\$69,800	Canadian
The Green Gables	Victoria	April 1995	56	\$4.0	\$71,428	Ismaili
The Fairways Hotel	Whistler	April 1995	194	\$14.0	\$72,165	Korean
Hotel Vogue	Montreal	Mar. 1995	154	\$11.5	\$74,675	American
Le Chateau Champlain	Montreal	Mar. 1995	616	\$18.0	\$29,221	Canadian
Hotel Furama	Montreal	Mar. 1995	106	\$4.1	\$38,679	Canadian
Sheraton Gateway Hotel	Toronto	Feb. 1995	481	\$51.9	\$108,000	American
WelcomINN Brampton	Brampton	Feb. 1995	136	\$3.21	\$23,618	Canadian
Holiday Inn Toronto East	Toronto	Feb. 1995	193	\$3.28	\$16,969	Canadian
The Marlborough Inn	Calgary	Feb. 1995	248	\$16.5	\$66,532	Ismaili
Valhalla Inn Toronto	Toronto	Jan. 1995	241	\$6.2	\$25,726	Canadian

Source: Colliers International Hotel Realty, June 1995.

increasingly sophisticated travelers) will likely result in the Canadian accommodation industry's human resource management practices having to become more comprehensive.

As indicated earlier, Canada is a major global destination. The majority of international visitors to Canada are currently from the United States. However, in 1995, the largest percentage increase in international visitors to Canada is expected to be from France and Japan. Exhibit II-9 summarizes travel to and from Canada.

According to the World Tourism Organization, international tourist arrivals to North America are projected to grow at an annual rate of 3.7% between 1990 and 2010. These projections are not available by country. Asia-Pacific is expected to fuel the growth for much of the world's economy and will represent an important growth market for the tourism industry. The Asia-Pacific countries expected to generate the most significant travel volume for Canada include: Japan, China, Taiwan, Korea, Singapore, Malaysia, and Thailand. Exhibit II-10 summarizes movements of tourists internationally, as prepared by the World Tourism Organization.

The continued growth in international travel has implications with regard to the need for stronger multi-lingual skills and cultural sensitivities in the accommodation workforce. In Canada, some initiatives are already underway, such as the Hotel Association of Canada's Asia-Pacific program, which assists accommodation operators in targeting the Asia-Pacific market through various initiatives including additional staff training. The case study on implementing language proficiency standards in Indonesia (Chapter V) discusses how another jurisdiction is trying to address this issue.

4. Consolidation and conversion

The recent trend towards consolidation and conversion of hotel brands is expected to continue. Consolidation can allow hotel chains to enter new geographic markets or to target new market segments. The potential for creating new hotel chains is limited due to an over-supply of accommodation facilities in many markets and a lack of prime sites in preferred geographic markets. Therefore, chain growth will likely be through conversions of individual properties (e.g., via acquisition or affiliation/franchising) or consolidation (i.e., mergers) of chains. To a lesser extent, new developments in select markets will provide an opportunity for growth.

Exhibit II-9

Travel to and from Canada—annual percentage increase/decrease

	1994						
	Volume (000s)f	% of Total	1991 Actual %	1992 Actual %	1993 Actual %	1994 Estimate %	1995 Forecast %
To Canada:							
U.S.A.	12,541	83.0	-1.8	-1.1	1.5	4.1	6.0
U.K.	582	3.9	-4.0	0.8	5.1	2.3	4.0
France	410	2.7	18.0	0.9	16.7	13.4	12.0
Germany	372	2.5	8.4	6.1	17.2	8.2	9.0
Japan	483	3.2	-3.6	-0.4	3.6	18.2	12.0
Total	15,105						
From Canada:							
U.S.A.	14,974		9.8	-2.8	-6.1	-13.4	8.0
Other	3,374		-10.5	9.9	5.1	3.3	-2.5

Source: Statistics Canada, CTRI Travel Exclusive, May 1995.

An increasing number of independent hotel operators are expected to become affiliated with a chain or marketing consortium in order to remain competitive in a global market. For an independent, the benefits of an affiliation with a chain or marketing consortium may include: brand identity, marketing strength, training programs, improved technology, access to a reservations system, operating support, and (possibly) easier access to financing. Some of the disadvantages may include: having to make significant changes to the operation (e.g., physical upgrade) or paying fees to a central reservation system during peak months when the hotel/motel may have historically operated at a high occupancy level.

The continued consolidation and conversion of hotel brands has various human resource implications. A higher quality of management (e.g. skills, professionalism) may be required. In addition, chains will want to ensure consistency in guest service and employee skill levels and may require operators to commit to more extensive training programs. The case study on the Sheraton hotel chain (in Chapter V)

discusses the human resource initiatives undertaken by one major hotel franchise company.

The number of management companies is also expected to decrease through consolidation and attrition. Hotel owners will increasingly expect management companies to tie compensation to hotel performance (i.e., calculating management fees as a percentage of profit). In the past, management companies were able to calculate fees on the revenue line which reduced the management company's incentive to better control expenses in order to improve profit margins.

Another emerging trend in the industry is strategic alliances, or partnerships, that bring together complementary tourism partners, and even competitors, in marketing tourist products. For example, the Experience Canada partnership¹ offers promotions to the travelling public by bringing together leading hotels, airlines, car rental companies, ground carriers, and charge card companies.

Exhibit II-10

Growth in international travel—by destination

	International Tourist Arrivals By Continent (millions)			Average Annual Growth Rate (%)
	1990	2000	2010	1990-2010
Europe	287	372	476	2.6
Americas:				
North America*	72	110	150	3.7
Caribbean	11	19	30	5.1
Central/South America	11	18	27	4.6
East Asia/Pacific	52	101	190	6.7
Africa	15	24	36	4.5
Middle East	7	11	18	4.5
South Asia	3	6	10	6.1
World	458	661	937	3.6

*In 1990, Canada represented 21% of the International Tourist Arrivals in North America.

Source: World Tourism Organization.

¹ A consortium of Canadian transportation, accommodation and related tourism suppliers.

5. Changing consumer preferences

The continually changing profile and needs of the corporate and leisure markets represent an ongoing challenge to the industry. Projections prepared by the Canadian Tourism Research Institute show that domestic pleasure travel will grow faster than domestic business travel as indicated in Exhibit II-11.

Increased pleasure travel is likely to take the form of short trips (i.e., three days or less) as opposed to the traditional, longer (e.g., two-week) trip. A growing trend is for vacation trips to be closer to home and more family-oriented. In addition, the travelling public is becoming more sophisticated and demanding due to increased exposure to a variety of high-quality experiences, and is showing a greater desire for convenience and vacation packages (e.g., all-inclusive holiday packages). The travelling public is also demonstrating greater concerns for their health and the environment.

Another factor that will have an impact on the profile and needs of pleasure travellers is age. The mature traveller market (i.e., over 55 years of age) is the fastest growing travel segment in North America.² Between 1980 and 1990, trips by mature Canadians to domestic destinations increased by 29% versus an increase of 5% for all Canadians. In Canada, the mature population will grow from 21% of the

population in 1991 (5.6 million) to 29% of the population by 2011³. Another major growth market is the post baby boomers (those born after 1965). While this age group may not be a direct purchaser of hotel rooms, research undertaken by the Travelodge chain has found that children have a great influence on their parents' choice of accommodation.

Business travel has grown at a slower pace than leisure travel due to ongoing government restraint, corporate downsizing, and increased use of telecommunication equipment. As "travel and entertainment" is the third highest controllable expense for Canadian companies, this item has come under increased scrutiny in an effort to better control operating expenses. However, some encouraging signs exist. CTRI's survey of business travellers, conducted in March 1995, found that 26% of respondents intend to make more business trips in the next six months than in the same period in 1994; in early 1995, business travel intentions for the next six months were found to be approaching 1990 levels (i.e., 29%). This represents an increase from a similar 1994 survey that found 21% of business travellers intended to travel more in the next six months compared to the previous year.

Each of the changing consumer preferences identified above has an impact on the quality and

Exhibit II-11 Domestic travel

	Percent Change		
	1993 Actual	1994 Estimate	1995 Forecast
Pleasure trips	2.3	3.6	3.9
Business trips	.5	2.7	3.5
Expenditures (current \$)	4.7	5.8	6.3
GDP Accommodation (constant \$)	2.8	5.7	5.6

Source: CTRI Travel Exclusive (May 1995).

²Source: Tourism Canada. Meeting the Service Expectations of Mature Travellers, March 1994.

³ Ibid

type of service being provided in accommodation facilities. However, service is no longer the sole variable for success. The notion of value has become the major decision criteria for consumer, suggesting consumers are willing to pay for higher quality at a higher price if there is perceived value. Those accommodation enterprises able to meet all the needs of guests are most likely to excel in the value equation.

The changing demographics (e.g., age, origin) of pleasure travellers may require that additional "cultural" training be provided to employees. The aging population may result in an increase in the number of disabled travellers. The increased emphasis on value may have implications on the type of employee hired (e.g., even more importance being attached to attitude and initiative) and reinforce the belief that front-line employees be given more responsibility and authority to make decisions (e.g., handling guest complaints).

6. Technology

The technology available to the accommodation industry, as for all industries, is continuously evolving. Price and performance of hardware is constantly improving, and software features and functions are continuously being enhanced. Front office systems are now PC-based (as opposed to being connected to main frames) and, thus, are more affordable for all operators.

The level of technology adoption varies by technology product and the size/complexity of the accommodation facility. Generally, those types of products with the most widespread use are:

- Front desk management/property management systems—to handle check-in and check-out, yield management, room inventory control and pricing. The property management system generally serves as the hub for the hotel's technology—all other technology products in the hotel (e.g., food and beverage point-of-sale system) are generally interfaced to the property management system.
- Food and beverage point-of-sale systems—for monitoring sales (by revenue and product) and to assist in the operation of all restaurant, lounge and related departments.

- Integrated accounting systems—linking food and beverage, rooms and other operating departments to produce property-wide operating statements.
- Reservation systems—ranging from single "1-800" numbers to integration with international airline, travel agent and chain hotel systems.

Additionally, voice mail, database packages (for both the rooms, and sales and catering departments), and property maintenance systems (e.g., security sensors, internal environment controls) are gaining acceptance.

The use of technology in the Canadian accommodation industry is thought to be almost on par with that of the United States—and generally ahead of many countries in Asia and Europe—a result of the representation of major, U.S.-based chains in Canada. Reliance on technological advances for the efficient operation of an accommodation facility has increased greatly over the very recent past.

The use of technology can represent a competitive advantage to operators either through access to (and from) computerized reservation systems and/or enhanced guest services (e.g., providing guest room modems or interactive and "on-demand" services). In many instances, the use of technology (e.g., guest-room modems) may become an industry standard. Ultimately, the technology must be used to enhance the guest experience or improve internal operating efficiencies.

The future is also likely to see greater emphasis placed on the ability to collect and manipulate customer databases, the use of technology for training (some limited applications already exist), and the provision of tools for more accurate budgeting and planning.

The continual decrease in the cost of hardware and a greater variety of technology products are expected to open technological options to an even wider range of accommodation businesses. However, despite these cost reductions, convincing owners to allocate funds to technology is perceived as a challenge by the hotel technology professionals and technology providers interviewed. In addition, the cost and complexity of some technology applications (e.g.,

reservation system—either proprietary or through a consortium) may remain so high as to limit the customer base to larger independent and chain hotels.

In implementing new technology, one of the key objectives should be to ensure that the various systems can be integrated and that the hotel will operate more efficiently through the use of technology. In addition, new technology should be selected based on the ability to meet consumer expectations. This concern relates both to technology made directly available to customers and the hotel staff's ability to use technology efficiently in servicing guests' needs. For some positions, computer literacy and flexibility may become basic requirements. For example, the increased use of the Internet will likely increase the need for front office/reservation staff to be computer literate.

Training on the use and support of technology will continue to be a big issue for the industry, specifically:

- As technology life-cycles shorten, accommodation operations can expect to have to invest in continual retraining of staff.
- Training should be structured to allow users to have a comprehensive understanding of technology.
- Graphically-oriented user interfaces will make using a computer more "intuitive." This, in turn, can make on-line training a more effective tool, given that basic access to the system becomes more straightforward.
- Training is required—for those employees who have not been exposed to computer operation—in the use of software tools that allow better yield management, rate forecasting, inventory management, etc.

7. Government involvement

All three levels of government are extensively involved in the development and control of the accommodation industry. Governments have an impact on the industry through financial, facilitative, regulatory and legal measures.

Much attention has been paid to the adverse impact that recent tax legislation (e.g., Goods and Services Tax, reduction in meal deductibility for businesses) and high property taxes have had on the accommodation industry. However, various levels of government have also undertaken several initiatives to assist the industry. Municipalities and provinces provide financial assistance to the industry through grants and funding of tourism programs. In some jurisdictions, visitor taxes have been implemented, or are being considered, to further assist with marketing initiatives. Many other initiatives have been based on the 1993 "Follow Through for Prosperity—Canada and the Tourism Industry" report, prepared by the federal government (Industry, Science and Technology Canada). To date, some of the federal initiatives undertaken include:

- Formation of Canadian Tourism Human Resource Council.
- Foundation of the National Advisory Board on Tourism Technology.
- Development of a Tourism Satellite Account by Statistics Canada.
- Commitment of more than \$190 million in funding for human resource development in the tourism industry.
- Formation of the Canadian Tourism Commission and increased federal funding to support domestic and international tourism marketing—from \$15 million to \$50 million.

Two of the above federal government initiatives relate specifically to human resources—formation of Canadian Tourism Human Resource Council, and funding of more than \$190 million for human resource development. The impact of these initiatives is discussed in greater detail in Chapter IV. In addition, several other government initiatives are expected to have a positive impact on the tourism industry. The North American Free Trade Agreement (NAFTA) should continue to increase the amount of international business done in Canada. The Open Skies agreement with the United States is expected to increase the number of flights—and, therefore, ease of access—between Canada and the United States. Some 64 new trans-border flights were announced in 1995.

In most cases, national tourism promotion budgets vary from year to year. In those countries where tourism has currently been identified as a leading economic generator (e.g., many Caribbean countries) fluctuations are less severe. However in others, like Canada, tourism promotion budgets depend on the significance of the tourism industry as perceived by the government of the day. Recently, tourism has been identified by the Canadian government—and several provincial governments—as an increasingly important priority.

Increased funding for tourism marketing is essential for Canada to maintain its position as one of the leading global destinations. For comparison purposes, Exhibit II-12 shows the national promotional budgets (based on government funding) for select countries in 1993—the most recent data available. The Exhibit also details the number of overnight international visitors to each of these

countries. Of the eleven most popular global destinations (see Exhibit II-1), Canada's national promotional budget ranked eighth. Of note are some of the other jurisdictions that have comparable budgets to Canada but attract significantly fewer visitors (e.g., Cyprus, Jamaica, Bermuda). Canada's budget has been significantly increased in 1995 with the formation of the Canadian Tourism Commission (CTC) and its \$50 million tourism marketing budget.

D. AN INTERNATIONAL PERSPECTIVE

The World Travel & Tourism Council (WTTC) research report "Travel & Tourism—A New Economic Perspective" shows that in 1994 the travel and tourism industry was the world's largest industry, generating direct and indirect employment for 204 million people worldwide. The industry had a gross output of US\$3.4 trillion in 1994.

Exhibit II-12

Sample of national tourism associations/departments —1993 total and promotional budgets (US \$000)

Country	Total Budget (US \$000)	% Change Previous Year	Promotion Budget (US \$000)	Int'l. Visitors 1993(000)
Canada *	22,828	-11.5	18,720	15,105
Australia	75,909	22.9	64,254	2,996
Austria	44,948	-1.1	N/A	18,257
Bermuda	28,699	0.0	14,366	413
China	10,457	-11.3	6,413	18,982
Cyprus	20,576	-0.5	8,043	1,841
France	75,245	-12.3	69,248	60,100
Germany	31,894	0.7	16,542	14,348
Hong Kong	24,187	8.0	22,982	8,938
Hungary	11,486	-9.3	5,513	22,802
Italy	40,680	-19.1	18,371	26,279
Jamaica	25,216	63.1	13,910	979
Mexico	139,192	89.2	36,170	16,534
Spain	123,831	-8.7	77,692	40,085
Switzerland	35,618	-1.8	29,637	12,400
United Kingdom	72,014	-6.3	N/A	19,400
United States	15,608	-30.6	12,600	45,793

Source: World Tourism Organization.

*Note: Canada's tourism marketing budget has been increased to \$50 million (\$ Cdn.) in 1995.

By the year 2005, travel and tourism employment is expected to increase to 348 million (from 204 million in 1994), and will represent 11.8% of the world's workforce. The majority of new jobs are expected to be in the Asia-Pacific region—employment in this region is expected to grow from 134 million in 1994 to 239 million in 2005. This growth in employment is due largely to the projected increases in visitor arrivals to the region.

The travel and tourism industry in the Asia-Pacific region underwent tremendous growth in the late 1980s. According to the WTTC, international visitor arrivals to the region grew by 69% between 1985 and 1990—compared to a worldwide growth rate of 36%. International visitor arrivals to the Asia-Pacific region are projected to grow by 47% between 1995 and 2000—compared to 24% worldwide. The high growth in Asia-Pacific is likely due in part to the significant increase in travel within the region (i.e., between Asia-Pacific countries).

Reflecting the growth of tourist demand in Asia-Pacific, Exhibit II-13 summarizes *Hotels* magazine's listing of recently-announced international hotel developments. The list is not all-inclusive, but does provide an indication of those destinations where hotel development activity is most rampant.

Clearly, the largest number of new hotels are being built in Asia—primarily in China (6) and Indonesia (5). Growth in the Asia-Pacific region is expected to continue at a brisk pace for some years to come. The Americas show the largest growth in new number of rooms due to the construction of the 3,000-room Beau Rivage Resort in Las Vegas.

E. SUMMARY

The future outlook of the Canadian accommodation industry appears promising. The industry has shown a gradual recovery from the recession of the early 90's (i.e., rising occupancies and average room rates) and forecasts are for continued growth in GDP. Tourism worldwide has been identified as a growth industry, and Canada is poised to continue to be a major player. The creation of the Canadian Tourism Commission is a prime example of the federal government's commitment to maintaining Canada's prominence on the international tourism stage.

Accommodation industry human resource practices are expected to continue to become more sophisticated due to a greater exposure to international practices (e.g., international chains operating in Canada) and the growing trend towards chain affiliation. Changing consumer preferences present both an opportunity and a challenge, both from a human resource and marketing perspective, for accommodation operators. The diversity of the Canadian accommodation industry (e.g., type of operation, chain affiliated versus independent) is an inherent challenge for implementing change on an industry-wide basis.

Exhibit II-13 New hotel construction—announced as of March, 1995

	Number of Hotels	Number of Rooms
Asia-Pacific	15	3,912
Australia	1	400
Europe	5	886
Middle East	5	1,500
Americas	8	4,131

Source: March 1995 Construction Report—*Hotels* magazine.

III EMPLOYMENT STRUCTURE OF THE INDUSTRY

The labour market analysis conducted as part of this study provides a framework with respect to the level and structure of employment in the Canadian accommodation industry, as well as identifying the key characteristics of industry workers. Projections of future employment levels by occupation are also provided.

Various data sources were used in this analysis, including:

- Statistics Canada's 1991 Census.
- The Labour Force Survey (LFS).
- Labour Market Activity Survey (LMAS).
- Canadian Occupational Projection System (COPS).

Each source uses somewhat different methods in the collection and calculation of statistics and projections. Unless otherwise noted, all data are from tabulations of the 1991 Census.⁴ Additional tables may be found in Appendix E.

As discussed in Chapter I, the accommodation industry has been defined in accordance with Statistic Canada's Standard Industrial Classification (SIC). The accommodation industry is defined as Major Group 91 and consists of four major sub-categories, specifically:

- SIC 911—Hotels, motels, and tourist courts.
- SIC 912—Lodging houses and residential clubs.
- SIC 913—Camping grounds and trailer parks.
- SIC 914—Recreation and vacation camps.

SIC 911 accounts for more than three-quarters of employment and economic activity in the broader accommodation services industry. This category includes:

- hotels
- suite hotels
- motor hotels/motor inns
- motels
- inns/lodges
- resorts
- spas
- guest houses /tourist homes
- bed and breakfasts

This chapter provides a detailed breakdown of demographic and related characteristics for the accommodation industry (Major Group 91) and, where data are available, for the sub-categories. For the purpose of this analysis, the four sub-categories have been condensed into two groups:

- Hotels/motels (SIC 911).
- Other accommodation (SIC's 912, 913 and 914).

A. SIZE

The most comprehensive employment information on the accommodation industry comes from the most recent Canadian Census (1991). The Census shows that 176,085 people were employed in the accommodation industry. Of these, about 82.7% worked in hotels and motels (145,540), 12.4% worked in all other areas of accommodation (i.e., campgrounds, travel trailer parks, recreation camps, lodging houses, residential clubs), and 5% were unassigned. Those workers who were "unassigned" did not provide sufficient information on the Census form to permit them to be allocated



⁴ Throughout this section, numbers and percentages in the tables may not sum to the totals due to rounding.

to either hotels/motels or other accommodation. Exhibit III-1 details employment levels in the Canadian accommodation industry in 1991.

Another excellent source of employment data is the Labour Force Survey (LFS). The LFS estimates that approximately 169,000 people worked in the accommodation industry, during 1991. However, the Census covers all of Canada (the LFS excludes the Territories) and has a larger sample. Therefore, the Census is believed to provide more reliable employment estimates.

Despite the high quality of the Census data, the number of people who work in the industry is understated in at least three ways:

1. The Census was carried out in a non-peak time for the industry. Census employment was recorded for the week preceding June 4, 1991, well before the summer rush and some summer hiring. Had the Census been carried out in July or August, higher employment figures would have resulted.
2. All industries have some of their workers coded to other industries, but with the accommodation industry proportionately more workers will be coded to the food and beverage industry because of the number of food and beverage outlets in hotels and motels. Nonetheless, hotel

and motel restaurant workers represent a large portion of the industry workforce (e.g., food and beverage servers are the second largest occupation, cooks are the fifth largest).

3. The Census records the industry of employment for a person's main job only. Multiple job holders are only about 4% of the Canadian labour force, but the accommodation industry (particularly in food and beverage) is an industry where one can expect to find people who have second jobs. Further, those holding second jobs in the industry (while working at their main job in another industry) can be expected to be part-time workers.

For these reasons, the Census underestimates the level of employment in the accommodation industry. To gauge the size of this underestimate, a special run of the Labour Market Activity Survey (LMAS) for the year immediately preceding the 1991 Census was done to:

- Measure the increase in people employed in the industry between May/June (the time the Census is conducted) and the summer peak.
- Measure the additional number of people whose main job was in another industry, but who worked at a second job in the accommodation industry.

The LMAS found that the number of people working in the industry at the summer peak was 12.3% higher than in May/June. A further 7.8% people had a second job in the industry while their main job was in

Exhibit III-1 Accommodation industry employment

	Number of People	% of Total
Hotels, Motels	145,540	82.7
Other Accommodation:		
Includes campgrounds, travel trailer parks, recreation camps, lodging houses, residential clubs	21,765	12.4
Unassigned	8,780	5.0
Total Accommodation Industry	176,085	100.0

Source: Statistics Canada, 1991 Census.

Note: The Accommodation Industry is Major Group 91 in Statistics Canada's Standard Industrial Classification (SIC); Hotels, Motels, Tourist Courts are SIC 911; Other Accommodation includes SIC 912, SIC 913, and SIC 914.

another industry. Applying these percentages to the 1991 Census employment figure, peak employment during the summer is estimated at 213,000.⁵ On an annual basis, employment in the industry increased by an average 7.2% due to second job holders.

B. LABOUR FORCE CHARACTERISTICS

The following sections provide a general profile of workers in the accommodation industry.

1. Gender

The accommodation industry attracts many women. Although women represent 45% of the people employed in Canada, they represent nearly 59% of the accommodation industry workforce, as Exhibit III-2 shows. The proportion of women is higher in

hotels/motels (59.7%) than in other accommodation (50.5%). Appendix E-1 details the proportion of women by occupational classification in the accommodation industry.

2. Age

People who work in the accommodation industry are much younger than the general working population of Canada. Exhibit III-3 shows that in all industries in Canada, 16.7% of people employed are under the age of 25 years—compared to 27% in the accommodation industry. Relative to the national average, the accommodation industry has a higher proportion of young people, and a lower proportion of the mid-aged people (25-44 years of age). Appendix E-2 details the age of

Exhibit III-2 Gender of people employed

	Total (#)	Men (%)	Women (%)
All Industries	13,005,500	55.0	45.0
Accommodation Industry	176,085	41.3	58.7
Hotels/Motels	145,540	40.3	59.7
Other Accommodation	21,765	49.5	50.5

Source: Statistics Canada, 1991 Census.

Note: "All Industries" includes all people employed in all industries in Canada.

Exhibit III-3 Age of people employed

	15-24 Years (%)	25-44 Years (%)	45+ Years (%)
All Industries	16.7	55.3	28.0
Accommodation Industry	27.0	46.7	26.3
Hotels/Motels	26.4	48.7	24.9
Other Accommodation	31.4	37.6	31.0

Source: Statistics Canada, 1991 Census.

Note: "All Industries" includes all people employed in all industries in Canada.

⁵ The estimate for the second job from the LMAS has a 25% sampling error. Therefore, the estimate of the number of people employed in the accommodation industry at peak could be as low as 209,000 or as high as 217,000.

accommodation industry workers by occupation.

Differences are evident in the age profile of people working in each of the two main sub-groups of the accommodation industry. People who work in other accommodation tend to be either younger or older. A much smaller proportion are mid-aged compared to those who work in hotels/motels.

The comparatively young age of the accommodation industry workforce has important human resources implications. With regards to turnover, young people may work in the accommodation industry as they experiment with various career opportunities or as they complete their education. On the other hand, the industry—relative to other industries—provides greater opportunities for employees to be assigned more responsibility at a young age. As the industry

becomes more advanced technologically, the ability to hire young people—who tend to be more computer literate—will likely prove beneficial for employers.

3. Class of worker

Of those people in Canada who work, 89% are employed in wage or salaried positions, and 10% to 11% who are self-employed in either incorporated or unincorporated businesses. A very small proportion, only 0.5%, work in a family business in an unpaid capacity. In general, a higher proportion of women (92.7%) than men (86%) work as paid workers and twice the proportion of men (13.8%) to women (6.5%) are self-employed.

Exhibit III-4 identifies the split between employed and self-employed workers in the accommodation industry relative to all Canadian industries.

Exhibit III-4 Class of worker

	Total (%)	Men (%)	Women (%)
All Industries:			
Paid Worker	89.0	86.0	92.7
Self Employed	10.5	13.8	6.5
Unpaid Family Worker	0.5	0.3	0.8
	100.0	100.0	100.0
Accommodation Industry:			
Paid Worker	92.2	89.6	94.1
Self Employed	7.3	10.1	5.4
Unpaid Family Worker	0.4	0.3	0.5
	100.0	100.0	100.0
Hotels, Motels:			
Paid Worker	93.7	91.1	95.4
Self Employed	6.0	8.7	4.3
Unpaid Family Worker	0.3	0.2	0.4
	100.0	100.0	100.0
Other Accommodation:			
Paid Worker	83.7	81.1	86.2
Self Employed	15.2	18.2	12.2
Unpaid Family Worker	1.1	0.7	1.5
	100.0	100.0	100.0

Source: Statistics Canada, 1991 Census.

Differences between the accommodation industry and all Canadian industries, with respect to self-employment, include:

- A slightly higher proportion of workers are employed in wage or salaried positions (92.2% compared with 89.0%) in the accommodation industry.
- A slightly lower proportion are self-employed (7.3% compared with 10.5%). The percentage of self-employed workers is especially high in other accommodation (e.g., campgrounds, trailer parks, and recreation camps).

- Self-employment is much higher among people working in other accommodation. Among men working in other accommodation businesses, 18.2% are self-employed—a much higher proportion than for all industries (13.8%).

4. Highest level of schooling

People who work in the accommodation industry have much lower levels of formal education than the general employed population in Canada. More than one third (37.1%) have not graduated from high school. Exhibit III-5 details the highest level of schooling in all industries and in the accommodation industry.

Exhibit III-5 Highest level of schooling

	Total (%)	Men (%)	Women (%)
All Industries:			
Less than High School Graduation	26.5	28.7	23.8
High School Graduation, Trade Certificate, Some Post-Secondary ¹	58.3	55.4	61.8
Post-Secondary Degree	15.2	15.9	14.4
Total	100.0	100.0	100.0
Accommodation Industry:			
Less than High School Graduation	37.1	31.2	41.3
High School Graduation, Trade Certificate, Some Post-Secondary ¹	57.1	61.2	54.2
Post-Secondary Degree	5.8	7.6	4.5
Total	100.0	100.0	100.0
Hotels/Motels:			
Less than High School Graduation	36.9	29.6	41.8
High School Graduation, Trade Certificate, Some Post-Secondary ¹	57.5	62.8	53.9
Post-Secondary Degree	5.6	7.6	4.3
Total	100.0	100.0	100.0
Other Accommodation:			
Less than High School Graduation	35.1	35.6	34.6
High School Graduation, Trade Certificate, Some Post-Secondary ¹	57.9	56.6	59.1
Post-Secondary Degree	7.1	7.8	6.3
Total	100.0	100.0	100.0

Source: Statistics Canada, 1991 Census.

¹"Some post-secondary" may include taking one or more courses at a post-secondary institution or receiving a diploma(s) and certificate(s) below degree level

Appendix E-3 details the proportion of people with less than high school education by occupational classification in the accommodation industry.

The relatively low level of education found in the accommodation industry has implications for training. While formal education may or may not be directly related to a person's ability to do a job, it is directly related to speed and flexibility of training. People with more formal education are typically better able to read, listen, think, comprehend, and express themselves—attributes crucial for effective training. Therefore, the lack of formal education in the accommodation industry is an important concern.

5. Mother tongue

Many people, including new Canadians, have worked in the accommodation industry while developing their English or French language skills. Some had neither English nor French as a mother tongue—though today they may be fluent in either or both languages.

Nineteen percent of the accommodation industry workforce do not have either French or English as a mother tongue, compared to 15.3% in the general working population. In some occupations in the accommodation industry—such as kitchen and food service helpers, dry cleaning and laundry—31% of workers do not have English or French as a mother tongue (see Appendix E-4). Also, more men than women have neither English nor French as a mother tongue. This difference is much more noticeable within hotels/motels. Exhibit III-6 contains a breakdown of mother tongue for all Canadian industries and for the accommodation industry—and sub groups.

Exhibit III-6 shows that a large proportion of people employed in hotels or motels have neither English nor French as their mother language—a much higher proportion than found either in other accommodation or all industries. For some reason, people who work in other accommodation are more likely to have either English or French as their mother language. The

Exhibit III-6
Mother tongue¹

	Total (%)	Men (%)	Women (%)
All Industries:			
French or English	84.7	84.2	85.3
Other than French or English	15.3	15.8	14.7
Total	100.0	100.0	100.0
Accommodation Industry:			
French or English	81.0	78.3	82.9
Other than French or English	19.0	21.7	17.1
Total	100.0	100.0	100.0
Hotels/Motels:			
French or English	79.9	76.5	82.2
Other than French or English	20.1	23.5	17.8
Total	100.0	100.0	100.0
Other Accommodation:			
French or English	89.1	88.5	89.7
Other than French or English	10.8	11.5	10.3
Total	100.0	100.0	100.0

Source: Statistics Canada, 1991 Census.

¹The Census allows multiple responses on the mother tongue question. If a respondent gave a multiple answer and at least one of the responses was French or English, that person was categorized in the 'French or English' group.

reason for this difference may be cultural (e.g., camping might be more of a Canadian experience than in some countries from which immigrants have come). Appendix E-4 provides greater detail on language at the occupational level.

The data contained in Exhibit III-6 and Appendix E-4 are based on mother tongue. The data do not indicate the representation of visible minorities in the industry. Proportions of visible minorities in the industry will differ because:

- Some visible minorities are born in Canada and have either French or English as their mother tongue.
- Some are born in other French or English speaking countries.
- Some people who come to Canada from non-French or non-English speaking countries are not visible minorities.

The relatively high proportion of employees who do not have French or English as a mother tongue has been identified by various industry representatives (including labour organizations and employers) as a major human resource issue. The lack of knowledge of English or French has implications for both the type of training and the level of guest service that is provided (e.g., even back-of-the-house employees have occasional guest contact), and for employees' career opportunities. Many employers and some labour organizations provide employees with access to language training and communications training programs.

C. OCCUPATIONAL BREAKDOWN

The great majority of employees in the accommodation industry work in a handful of occupations. In fact, half of all employees work in five occupations: light duty cleaners, food and beverage servers, accommodation managers, hotel front desk clerks, and cooks. Three-quarters of all employees work in just 15 occupations. Exhibit III-7 provides a detailed breakdown of the

Exhibit III-7 Occupations in the industry

	Accommodation Industry		Hotels and Motels	
	Number	%	Number	%
Light Duty Cleaners	29,265	16.6	27,405	18.8
Food & Beverage Servers	20,985	11.9	19,500	13.4
Accommodation Managers	17,705	10.1	14,330	9.8
Hotel Front Desk Clerks	11,640	6.6	11,385	7.8
Cooks	9,560	5.4	7,985	5.5
Bartenders	8,320	4.7	7,840	5.4
Kitchen & Food Service Helpers	7,560	4.3	6,660	4.6
Janitors, Caretakers	7,180	4.1	4,920	3.4
Restaurant Managers	3,965	2.3	3,580	2.5
Accounting & Related Clerks	2,990	1.7	2,690	1.8
Chefs	2,665	1.5	2,475	1.7
Receptionists	2,465	1.4	2,160	1.5
Dry Cleaning & Laundry	2,270	1.3	2,165	1.5
Program Leaders ¹ & Sports Instructors	2,420	1.4	575	0.4
Executive Housekeepers	1,710	1.0	1,670	1.1
All Other Occupations (308)	45,385	25.8	30,200	20.8
Total	176,085	100.0	145,540	100.0

Source: Statistics Canada, 1991 Census.

¹Includes such jobs as recreation co-ordinators and special events organizers.

number of workers by occupation. Appendices E-2 through E-5 provide additional breakdowns for individual occupations—including breakdowns by gender, education, age and part-time work. Job descriptions and associated responsibilities for these occupations will vary due to: size and type of establishment, level of service being offered, organizational hierarchy (i.e., levels of middle management), management style and other reasons. The Canadian Tourism Human Resource Council's publication "The Student's Travel Map—A Guide to Tourism Careers, Education and Training" provides general job descriptions for a number of occupations in the accommodation industry.

D. PART-TIME VERSUS FULL-TIME WORK

The 1991 Census has data on the work patterns of people employed during the previous calendar year. These data show how much work people employed in

the accommodation industry in 1991 had in the previous year.

The amount of work performed annually can be examined in at least three ways: number of weeks of work during the year; whether that work was mostly full-time or part-time; and for the part-timers, how many hours per week they usually worked. This section will examine each of these breakdowns.

1. Part-year work

The Census asks people how many weeks they worked in the calendar year 1990. Exhibit III-8 shows that people who worked in the accommodation industry in 1991 were much more likely than employed people in all industries to have worked for only part of the year in 1990. The reason people worked part-year may be voluntary (e.g., going to school for part of the year) or involuntary (e.g., employers offering only seasonal employment).

Exhibit III-8
Full-year versus part-year work—1990

	Part-year (1-26 weeks) (%)	Part-year (27-48 weeks) (%)	Full-year (49-52 weeks) (%)
All Industries:			
Both Sexes	13.9	19.4	66.7
Men	12.4	18.6	69.0
Women	15.8	20.4	63.8
Accommodation Industry¹:			
Both Sexes	24.1	23.4	52.4
Men	21.8	22.1	56.2
Women	25.8	24.4	49.8
Hotels/Motels:			
Both Sexes	21.4	23.8	54.9
Men	18.0	22.3	59.7
Women	23.7	24.7	51.6
Other Accommodation:			
Both Sexes	41.7	21.9	36.4
Men	41.5	20.7	37.7
Women	41.9	23.0	35.0

Source: Statistics Canada, 1991 Census

Note: Rows may not add due to rounding.

¹Includes those people in the accommodation industry in 1991, but who may have worked in another industry in 1990.

Whatever the reason for working fewer weeks, Exhibit III-8 shows that there is a higher incidence of part-year employment in the accommodation industry in a given year than in the Canadian workforce in general. In addition, workers in the accommodation industry are more likely than the working population to have had seasonal work. Within the accommodation industry, people who work in other accommodation are more likely to have had seasonal work than those who work in hotels/motels. Appendix E-5 details the number of employees from which percentage distributions in Exhibit III-8 were calculated.

2. Part-time work

Another work pattern characteristic is part-time work—defined in the Census as less than 30 hours of work per week. The 1991 Census asked people who had been employed during the 1990 calendar year if they worked mostly part-time or full-time during their period of employment. Exhibit III-9 shows the results.

Exhibit III-9 shows that the accommodation industry has higher levels of part-time work than the general workforce—Appendix E-6 details the number of part- and full-time workers. About one-quarter (24.2%) of all people working in the accommodation industry work part-time. In addition, the Census underestimates how many people are part-time since it does not measure the number of people who work in the industry in a second (mostly probably, part-time) job.

Exhibits III-9 and III-10 indicate that part-time work is usually done by women—women are more than two-thirds of all part-time workers in the accommodation industry. People work part-time because: they cannot get full-time work, they do not want to work full-time, or employers are not offering full-time work. The proportion of women in part-time positions in the accommodation industry (28.2%) is similar to all industries in Canada (27.3%) with respect to women in the workforce. However, where the accommodation

Exhibit III-9
Worked in 1990—part-time work

	Total %	Men %	Women %
All Industries:			
Part-time	17.8	10.1	27.3
Full-time	82.2	89.9	72.7
	100.0	100.0	100.0
Accommodation Industry:			
Part-time	24.2	18.6	28.2
Full-time	75.8	81.4	71.8
	100.0	100.0	100.0
Hotels/Motels:			
Part-time	24.1	18.5	27.9
Full-time	75.9	81.5	72.1
	100.0	100.0	100.0
Other Accommodation:			
Part-time	24.3	18.4	30.0
Full-time	75.7	81.5	69.9
	100.0	100.0	100.0

Source: Statistics Canada, 1991 Census.

industry is very different is in the high proportion of men in the industry who work part-time: 18.6% compared to the national rate of 10.1%.

The Royal Commission of Inquiry into Part-time Work⁶ explained that whereas a sizable proportion of women work part-time in each age group, men tend to be more likely to work part-time when they are young. Consequently, the age of men and women in the accommodation industry who worked part-time was analyzed and results are presented in Exhibit III-10.

Men who work part-time in the accommodation industry tend to be young—two-thirds were under 25 years. By contrast, women part-time workers were older—nearly two-thirds (60.6%) were 25 years of age or older.

As a general rule, male part-time workers in the industry tend to be under 25 years of age, while female part-time workers tend to be 25 years of age or older. But as Exhibit III-10 shows, women far outnumber men in part-time work in the industry—with more than twice as many women part-time workers as men.

Appendix E-7 details the proportion of part-time workers by occupation. The occupations with the highest proportion of part-time workers are: kitchen/food helpers (43%), food and beverage servers (39%) and light duty cleaners (33%).

3. Seasonality in part-time and full-time work

The smaller LFS survey allows the monthly variation in part-time and full-time work in the accommodation industry to be examined.⁷

Exhibit III-11 shows how for both the accommodation industry as a whole and hotel/motels, full-time employment increases significantly during the summer months of June to September. By contrast, part-time employment stays relatively constant during the year, and even drops slightly in some summer months.

The reason why part-time employment drops slightly in the summer months may be due to some part-time employees moving from part-time to full-time during the busy peak period. However, the LFS most probably does not capture all part-time employment in the industry. The LFS measures only the industry of a person's main job. Were the industries of the jobs of multiple job holders also measured, part-time employment in the accommodation industry would be higher by about 7%-8%, particularly in the summer months.

Exhibit III-10 Part-time workers in the accommodation industry

	Men		Women	
	Number	Percent	Number	Percent
15-18 years of age	3,585	27.6	3,865	14.0
19-24 years of age	5,110	39.3	6,980	25.4
25 years and over	4,305	33.1	16,675	60.6
Total	12,995	100.0	27,510	100.0

Source: Statistics Canada, 1991 Census.

⁶ Labour Canada, Part-time Work in Canada. Report of the Commission of Inquiry into Part-time Work, Chapter 3, (Marilyn Mohan), 1983.

⁷The numbers in the Census and LFS, while different, are accurate. But they refer to different samples, dates, etc.

4. Number of hours worked by part-timers

Exhibit III-12 contains a summary of hours worked in the accommodation industry by part-time workers. Of course, although part-time work is defined in

Statistics Canada surveys as less than 30 hours per week, many of the 41,000 part-time workers in the accommodation industry in 1994 usually worked far fewer than 30 hours. More than half usually worked less than 20 hours per week.

Exhibit III-11

Monthly employment in the accommodation industry—1994

	Accommodation Industry			Hotels/Motels		
	Total (000s)	Full-time (000s)	Part-time (000s)	Total (000s)	Full-time (000s)	Part-time (000s)
January	162	117	45	156	112	44
February	166	122	44	161	118	43
March	160	119	41	154	114	40
April	156	116	40	149	110	38
May	169	129	39	154	116	38
June	195	151	44	170	129	41
July	218	176	42	171	133	38
August	219	184	35	176	142	34
September	186	146	41	165	127	38
October	171	133	39	157	121	36
November	168	131	36	155	121	34
December	170	130	39	161	124	38
Average for year	178	138	41	161	122	38

Source: Labour Force Survey.

Exhibit III-12

Usual number of hours worked per week—1994

	Accommodation Industry		Hotels/Motels	
	Number	Percent	Number	Percent
1-19 hours/week	23,000	56.1	21,000	55.3
20-29 hours/week	18,000	43.9	18,000	47.4
Total part-time	41,000	100.0	38,000	100.0

Note: Columns may not add due to rounding.

Source: Statistics Canada, Labour Force Survey, Annual Averages, 1994.

5. Why people work part-time

While the Census has a large sample and gives good estimates of part-time employment in the industry, it does not ask people why they work part-time. These questions are asked in the smaller, monthly Labour Force Survey.⁸

In the LFS, all part-time workers—those people working less than 30 hours per week—were asked if they were working part-time because they:

- Could only find part-time work.
- Were going to school.
- Did not want to work full-time.
- Had an illness or disability.
- Had personal or family responsibilities.
- Worked in a job that was considered full-time but required less than 30 hours per week.

The most common reason given by part-time workers in the accommodation industry in 1994 for not working full-time is that they could not find full-time work. Almost 44% (18,000) of part-time workers in the industry were working part-time involuntarily, and would work longer hours if available. Another 40% worked part-time voluntarily, including 24.4% that work part-time because they are going to school and 14.6% who choose not to work full-time. The remaining 17.1% gave other reasons for working part-time. These findings are summarized in Exhibit III-13.

Exhibit III-13 also contains the reasons for part-time work in 1989 as stated by part-time workers. As effects of the recession were still having an impact on many parts of the country in 1994, it was felt that data for 1989 might provide a more representative analysis.

Exhibit III-13 also shows that the size of the part-time labour force grew between 1989 and 1994. The largest growth was in the group of part-time workers who worked part-time because they could only find part-time work. This group grew from 11,000 in 1989 to 18,000 in 1994. Whereas this group contained 43.9% of all part-time workers in the industry in 1994, it accounted for only 29.7% in the pre-recession year of 1989. A higher proportion of the part-time workforce was working voluntarily in 1989—32.5% (12,000) were working part-time because they were going to school and 18.9% (7,000) who did not want to work full-time.

Due to a stronger economy, resulting in more full-time job opportunities across all industries, 1989 can be regarded as a more normal year than 1994 with respect to the proportion of part-time work in the accommodation industry. As a result, a realistic conclusion is that the part-time work offered by the accommodation industry suits at least half of all part-time workers—those going to school (32.5%) and those who do not want full-time work (18.9%)—as shown in Exhibit III-13.

Exhibit III-13

Reasons for working part-time in the accommodation industry

	1994		1989	
	Number	Percent	Number	Percent
Could only find part-time work	18,000	43.9	11,000	29.7
Going to school	10,000	24.4	12,000	32.5
Did not want full-time work	6,000	14.6	7,000	18.9
All other reasons	7,000	17.1	7,000	18.9
Total	41,000	100.0	37,000	100.0

Source: Statistics Canada, Labour Force Survey, Annual Averages. 1994 and 1989.

⁸ The numbers in the Census and LFS, while different, are accurate. But they refer to different samples, dates, etc.

As many as 70% of all part-time workers may be satisfied with part-time accommodation industry work as the remaining 18.9% of part-time workers are working part-time due to a disability, illness, personal or family responsibilities. As a result, it appears about one-third (30%) are working part-time involuntarily and desire more work.

These findings have two significant human resource implications:

- Accommodation employers provide significant part-time work opportunities to workers who likely have no intention of staying in the industry (i.e., those going to school). On the other hand, many part-time accommodation workers choose to work part-time, and do so over many years, often staying with a given employer longer than many full-time employees.
- Generating more full-time workers will require attracting new entrants to the industry—as well as creating more full-time opportunities—not just “converting” existing employees from part-time to full time.

As discussed earlier, the seasonal variances in business volume routinely see conversion of some part-time employment to full-time during peak seasons. Additional data on seasonality-induced employment variances, other than identification of employment by month (Exhibit III-11), are not available.

E. EMPLOYMENT GROWTH

Projecting future employment growth is difficult. Projections require that assumptions be made about the way the world and economy will look in the future. Frequently, change is rapid and its magnitude and direction are unexpected. Although large scale forecasting models are imperfect, in Canada the best source of employment projections is the Canadian Occupational Projection System (COPS).⁹

1. Overview

Projecting future employment growth for the accommodation industry, even with COPS, is more difficult than for most other industries because COPS does not examine the accommodation industry by itself. The projections are for “COPS industry #64” which comprises both the food and beverage industry plus the accommodation industry.

COPS industry #64 is a very fast growing industry. Between 1984 and 1993, the industry grew 28% from an average of 604,700 people employed during the year to 774,000—a 2.8% compound annual growth rate. The majority of this growth was from the food and beverage industry. Employment in food and beverage grew by 34.7% and accommodation grew by only 8.4% during these ten years—employment in hotels/motels increased by 9.2% in the same period. Employment growth in the accommodation industry was positive, fairly constant, but modest in size.

In order to use COPS industry #64 to derive projections for the accommodation industry, the historical relationship between the growth of food and beverage and the growth of accommodation has been assumed to continue. The historical relationship is based on an analysis of employment growth over a ten-year period (1984-1993). Using a broad range of years (i.e., 10 years) provides a better basis for establishing more meaningful comparative compound annual growth rates.

Exhibit III-14 shows the historical and projected future employment growth in the accommodation industry. Between 1984 and 1993, the compound annual growth rate in the accommodation industry was 0.91%. Virtually all this growth occurred between 1984 and 1989, when net employment in the accommodation industry grew at a compound annual rate of 1.6%—hotels/motels grew at a compound annual growth rate of 1.7% during these years.

⁹Appendix E-8 identifies the assumptions used for the COPS projections in this study together with more detail on the methodology employed.

Based on the COPS projection of aggregate employment of the accommodation and food and beverage industries, and assignment of this growth based upon the historical share of growth between accommodation and food and beverage, the accommodation industry will experience modest annual growth in net employment to the year 2005.

The annual compound growth of approximately 1.3% to the year 2000, and 1.1% to the year 2005 is slightly higher than the industry's historical annual growth of approximately 0.9% between 1984 and 1993. Thus, given the assumptions underlying the COPS projection, the accommodation industry can be expected to continue its past modest growth into the next decade.

Again, it should be noted that these growth rates are for net employment and do not reflect total employment opportunities in the industry due to employee turnover. In addition, some industry experts believe that the accommodation industry could experience higher employment growth due to new tourism developments (e.g., signing of Open Skies agreement, creation of Canadian Tourism Commission).

2. Future employment growth by occupation

COPS projects employment growth for industries and for individual occupations within each industry. The COPS occupational projections either assume that the occupational mix in the industry stays the same as in the last Census or that the mix changes with time¹⁰. Projections based on assumptions that the occupational mix will change, were not available at the time of this report. For this study, projections have assumed that the occupational mix will remain the same as in the 1991 Census.

Therefore, the occupational projections are very conservative for two reasons:

- The historical ratio of growth between the food and beverage industry and the accommodation industry is assumed to continue in determining the projected future employment size of the accommodation industry. This ratio was applied to the combined industry growth that COPS projected.
- The occupational share and mix existing in the 1991 Census is assumed in the occupational projections.

Exhibit III-14

Employment growth in accommodation industry—compound annual growth rate

		Projected	
	1984-1993	1993-2000	1993-2005
Accommodation	0.91%	1.28%	1.11%
Hotels/Motels	0.98%	1.38%	1.19%
Food & Beverage	3.37%	4.73%	4.09%
Total (Accommodation plus Food & Beverage)	2.78%	4.04%	3.53%

Source: Derived from Statistics Canada, Labour Force Survey and Human Resources Development Canada, COPS projection for industry #64.

¹⁰ Projections which assume the same occupational share and mix as the last Census use 'constant coefficients' and those which change the share use 'variable coefficients.' At the time of writing some variable coefficients were available (curvilinear coefficients), but as these depended in part upon inferences being made about concordance between SOC 1980 occupational definitions and SOC 1991 definitions, they were not used. In addition, at the time of writing, curvilinear coefficients were only available at the 2 digit level of detail.

Exhibit III-15 shows the projected net employment increase for the largest occupations in the accommodation industry. These projections attempt to give a general estimate of how many more people will be working in each occupation at the end of the period. They are estimates of the size of net growth only. They do not include turnover within each occupation.

As shown in Exhibit III-15, net growth in even the largest occupations is modest. For occupations identified with the highest growth (i.e., light duty cleaners and food and beverage servers), the increase in number of people employed is only a few thousand over a twelve-year period.

F. SKILL LEVELS

Effective planning for future human resource requirements in the accommodation industry necessitates determining the type of training and level of education required by both new and existing occupations. Because the COPS occupational projection used in this study assumed the same proportionate occupational mix in the industry as in the 1991 Census, the current skill profile is the same as the projected skill profile.

Canada's new National Occupational Classification (NOC) estimates the skill level required for each occupation (i.e., the amount and type of education and training required to enter and perform the duties of an occupation).

Exhibit III-15
Projected employment growth by occupation—1993 to 2005

	Net Employment Growth (rounded)
Light Duty Cleaners	4,000
Food & Beverage Servers	2,800
Accommodation Managers	2,400
Front Desk Clerks	1,600
Cooks	1,300
Bartenders	1,100
Kitchen & Food Helpers	1,000
Janitors	1,000
Restaurant Managers	500
Accounting Clerks	400
Chefs	400
Receptionists	300
Program Leaders & Instructors in Sport	300
Dry Cleaners & Laundry	300
Secretaries	300
Executive Housekeepers	200
All Other 308 Occupations	5,800
Total	23,800

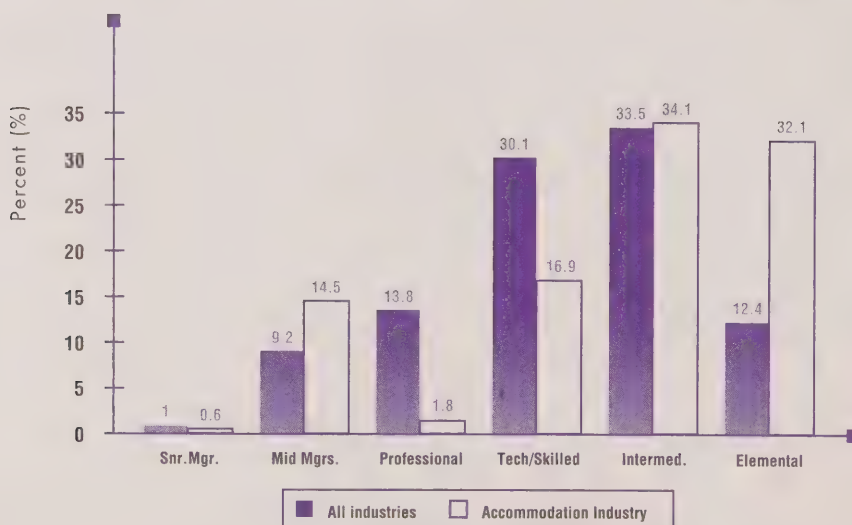
Source: Derived from Human Resources Development Canada, COPS 1993 projections. Projections are based on Labour Force Survey annual averages.

Note: For occupations with small employment growth (e.g., less than 1,000), projections should be regarded as very general estimates only.

Exhibit III-16**Education and training required for non-managerial groups**

Occupation	Education and Training Requirements
Professional Occupations	<ul style="list-style-type: none"> • University degree (generally)
Technical, Paraprofessional & Skilled Occupations	<ul style="list-style-type: none"> • 2 or 3 years of post-secondary education • 2 to 4 years of apprenticeship • 3 to 4 years of secondary school plus 2 years of on-the-job training or specific work experience • Supervisory responsibilities • Health and safety responsibilities
Intermediate Occupations	<ul style="list-style-type: none"> • 1 to 4 years of secondary school • Up to 2 years of on-the-job training or specific work experience
Elemental Occupations	<ul style="list-style-type: none"> • Up to 2 years of secondary school and a short work demonstration or on-the-job training.

Source: National Occupational Classification.

Exhibit III-17**Skill profile of accommodation employees compared to all industries**

Source: National Occupational Classification.

Occupations are divided into one of six general groups: senior managers; middle and other managers; professionals; technical, paraprofessionals and skilled occupations; intermediate occupations; and labouring or elemental occupations. Exhibit III-16 shows the education and training requirements for the four non-managerial groups, as specified by the NOC.

Using NOC, comparisons of the skill profile of jobs in the accommodation industry can be made with jobs in all industries in Canada, as shown in Exhibit III-17. Relative to all industries in Canada, the accommodation industry has: a much larger proportion of elemental jobs; about the same proportion of intermediate jobs; far fewer skilled/technical/paraprofessional/supervisory and professional jobs; proportionately more middle management jobs; and about the same proportion of senior management jobs.

Considering the fact that the majority of accommodation industry jobs are at the elemental and intermediate skill levels, and the fact that most operators prefer to train on-property for many of these positions, the employee training and development emphasis of the future will likely continue to be focused on on-the-job training.

G. SUMMARY

The Canadian accommodation industry (Major Group 91) employed approximately 180,000 people in 1991, and net new employment growth in the industry for the period 1993 to 2005 is projected to be approximately 1.1% annually.

Many of the labour force characteristics of the accommodation industry are considerably different than those of the general working population in Canada. The industry has a higher proportion of: women, younger workers, part-time and seasonal workers, people with lower levels of formal education, and people for whom English or French is a second language. These characteristics all have significant human resource implications, particularly in the area of training.

The accommodation industry will continue to depend less than most industries on post-secondary education and training in educational institutions. Senior managers, professionals, technical and skilled occupations will continue to be a small proportion of total jobs. At least two-thirds of all new jobs (elemental and intermediate) will require on-the-job training, and this will continue to be the training focus of the industry.

IV HUMAN RESOURCE ISSUES

The analysis of human resource issues focused on an underlying concern within the industry, specifically within SIC 911 (hotels/motels):

How to attract, train and keep the "right" employees.



In an industry that historically has high staff turnover and a large proportion of part-time workers, such a focus is essential to the growth and strengthening of the Canadian accommodation industry.

Various issues and the corresponding implications are discussed below. The issues were identified through a series of interviews, focus groups, and case studies conducted among various stakeholders in SIC 911. A list of interviewees, focus group participants and case study subjects is contained in Appendix B.

A. ESTABLISHING THE NEED FOR BETTER HUMAN RESOURCE PRACTICES

The wide variety of accommodation businesses (e.g., size, affiliation, service/amenity level) and business circumstances (e.g., location, union vs. non-union, market conditions) has an impact on the value placed on human resource practices. According to both accommodation operators and other stakeholders (e.g., educators, labour unions, employees) that were interviewed, the accommodation industry lags others in its commitment to—and investment in—the development of effective, long-term human resource practices. As a result, the perception of the industry held by potential employees and career influencers is not as positive as it might be. The perceived and actual rate of turnover within the industry—particularly when compared to other industries—suggests that at least some of these perceptions have merit.

For the purpose of discussing human resource issues in the Canadian accommodation industry, a fairly broad definition of "human resource practices" has been used. The definition includes the approach and methodology for training, career planning, compensation, management, cultural

issues, and the interface with organized labour. The reference to "better" human resource practices refers to enhancing the attention paid to these practices and, by extension, to individual employees, in addition to the value placed on employees as a business asset at both the property and head office level.

1. A wide disparity exists in recognizing the value of good human resource practices

Despite a frequently stated emphasis on "customer service" as a differentiating factor in marketing both destinations and individual accommodation properties, the industry is far from consistent in recognizing the human component of customer service. For example, training is viewed as a "necessary component of maintaining customer satisfaction" at one end of the spectrum and, if conducted at all, as an "out-of-pocket cost" at the other end. Some of the more progressive accommodation operators have devoted considerable resources and time to investigating best practices, addressing the need to recognize the "value" of employees from a guest-relations viewpoint and the need to compensate, train and promote employees within an equitable work place. At the other end of the spectrum, many operators who have not placed as much emphasis on human resource issues have done so as a result of various factors including financial constraints and a lack of knowledge regarding the benefits of sound human resource practices.

A survey questionnaire distributed during this study to most major hotel chains and independent hotels—and a request for a one-hour meeting to probe more qualitative issues—resulted in differing levels of response. More than half of the major hotel chains in Canada were unable to respond either due to the lack of data, conflicting priorities, the skill set of the human resource professional, and/or for confidentiality reasons. Franchise operators typically did not maintain any detailed human resource data at "head office"—to the point of being unable to provide estimates of total employees. Even among management companies, where the staff are typically the responsibility of the management company, not the hotel owner, detailed information was not able to be provided.

The feedback from independent hotel owner/operators was only somewhat more positive than the feedback from the chain hotel companies. While similar difficulties were encountered in identifying respondents willing to participate, those that did were generally able to provide both quantitative and qualitative responses. The high response rate was possibly a result of the smaller scale of the operation and the ability of the owner/operator to answer "off the cuff."

No significant factors differentiating those chain or independent hotels willing or unable to respond (e.g., size, location, chain affiliation) could be identified. Positive and negative responses to requests for interviews were received from different regions of Canada, from various sizes of accommodation facility and from both chain and non-affiliated properties. Nonetheless, some general characteristics that demonstrate the low priority given to sound human resource practices were identified by survey respondents, for example:

- A general lack of awareness of the training/hiring/recruiting implications—and associated cost—of turnover.
- No attempt to measure productivity gains against training costs at the facility level, although recognizing the difficulty of measuring these gains in a service industry.
- Modest, if any, growth in training and human resource development budgets over the past several years. Generally, these budgets are already quite low or nominal in comparison to total labour cost.

From the point of view of accommodation industry associations at various levels, human resource issues have not been given a very high priority. The industry is beset with a variety of challenges resulting from the financial implications of the recent recession, increased taxation, regulatory and legislative impacts and a host of other local or situation-specific issues (e.g., liquor licensing, labour legislation, introduction of casino gaming). As a general rule, the priority within the tourism industry has been on marketing and marketing-related issues focused on increasing top-line revenue.

2. Quantifying the value of sound human resource practices

None of the accommodation operators interviewed had ever attempted to quantify, in a statistically-valid manner, the value of sound human resource practices on financial performance, despite a recognition of the substantial cost involved in hiring and training staff. A possible explanation is the widely-held assumption that certain industry characteristics (e.g. turnover) and related costs are unavoidable. Some questions also exist regarding the availability of skills and financial investment, at the enterprise level, required to undertake such an analysis. Within the human resources departments of major chains and independent accommodation facilities, day-to-day priorities have tended to focus on such shorter-term issues as negotiating labour agreements and supporting human resource professionals at the property level. Time and budget constraints have been a significant factor in limiting the future-oriented focus of the human resources department.

"What's in it for me?" — General Manager of a major urban hotel when asked to participate in the interview process for this study.

Of the independent and chain accommodation operators interviewed who were able to quantify expenditures on training—less than half of those interviewed—budgets ranged from less than 0.5% of revenue to about 4%. The median tended to be about 1%. Interestingly this finding is similar to a study undertaken for Tourism Training Australia by KPMG in 1991 and is consistent with other published material.

Various studies have been done that quantify the return on training investment and the cost of turnover in many industries, including accommodation. Unfortunately, little of this data has been used successfully as a tool for justifying greater—or more efficient—expenditures. To an extent, a poor job has been done linking the results of these studies to the concerns of the owner/managers of accommodation facilities. To an independent hotelier or even a chain hotel human resource professional, the short-term, "bottom-line" results of a training or similar initiatives need to be communicated in order to generate

interest. Much of the analysis completed to date, although valid, has tended to be academically focused with little direct application to the operator.

B. PERCEPTIONS OF THE INDUSTRY

Perceptions of the accommodation industry vary widely among current employees, potential employees and career influencers (e.g., high school guidance counsellors, family and friends).

1. Motivations and concerns of new entrants

Persons currently employed in the industry—particularly those who see working in the industry as a long-term career—view factors other than wages as key motivating criteria. Participants in the employee interviews and focus groups routinely cited working with people, the diversity of the industry and the variety of occupations and career paths as key

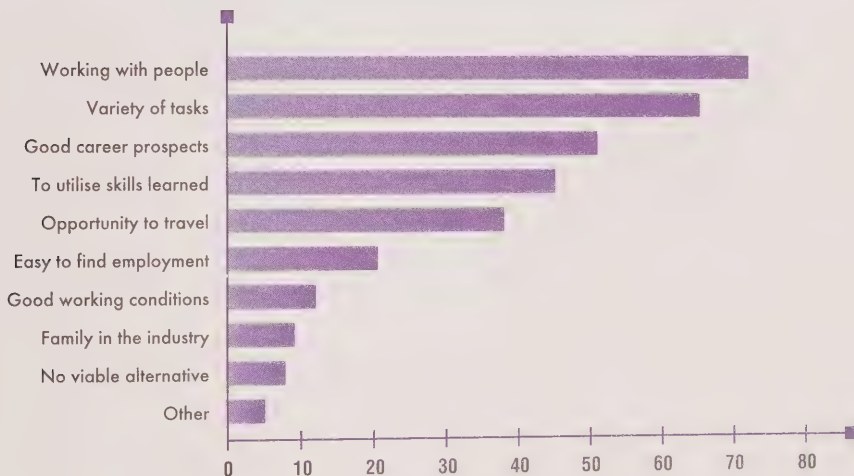
motivating factors. Long and irregular hours, working conditions, compensation (although not always) and seasonality are viewed as negative factors for those considering a career in the industry.

"You get to meet and work with interesting people from all over the world." — Employee at a large urban hotel.

"You have to love the work, because you won't get rich at it." — Employee at a large urban hotel.

A study undertaken in 1994 by the International Hotel Association (IHA), entitled "The International Careers and Choices Survey"¹¹ confirms these perceptions. One question on the IHA survey asked respondents to identify reasons for being attracted to the hospitality industry. The results are shown in Exhibit IV-1.

Exhibit IV-1 Reasons for being attracted to the hospitality industry



Source: *The International Careers and Choices Survey*, Dr. Kate Purcell, Oxford Brookes University, U.K. and the International Hotel Association, 1994.

¹¹The study sample included 600 course leavers (1990) from Hotel and Catering Management Degree and comparable full-time professional education courses in the Netherlands, Hong Kong, Finland, France, United States, Great Britain, Australia and Sweden.

Interviews undertaken for the Canadian accommodation sector study with students in Canadian university, college and other education/training facility or hospitality/ accommodation programs suggest similar motivating factors for entering the industry as those identified by current employees in the IHA study. Optimism regarding school-to-work transition varied somewhat by region, with those in British Columbia, Ontario and Quebec being more positive about career opportunities. Students in Atlantic Canada and one private training institution in central Canada were less optimistic. Generally, students were aware of industry working conditions (e.g., long hours, distant advancement opportunities), although views of advancement potential might be somewhat unrealistic.

Many students felt that support was not forthcoming from family and friends for their career choice.

Even those in degree programs saw a challenge in describing the educational needs and career opportunities in the industry.

"Why does it take five years to learn hospitality? What can be so difficult?" — Student in a university-level hospitality program paraphrasing a friend's reaction to his career choice.

The perceptions of the industry by career influencers (e.g., family, friends, school counsellors) requires significant improvement before accommodation sector jobs are viewed as an attractive career choice. Often accommodation sector jobs are seen as servile, low-paying positions offering little opportunity for long-term advancement. The awareness level of career influencers towards occupations in the accommodation industry is often limited to past contact with front-line accommodation employees. In many cases, accommodation industry jobs are perceived as seasonal, a stepping stone towards a position in another industry or as an intermediate step while attending higher education in another discipline.

Despite the efforts of regional tourism associations (e.g., Tourism Industry Association Of Nova Scotia) and provincial education councils (e.g., Pacific Rim Institute of Tourism) in organizing career fairs, high school counsellors are largely unaware of what constitutes an "ideal" candidate for the industry.

Further, little information is available regarding the types of jobs and/or career opportunities in existence. While high school counsellors are far from the only influencers of potential employees in the accommodation industry, they could play an active role in identifying candidates suitable to accommodation industry jobs. Generally, high school counsellors rely on information provided to them (e.g., growth prospects of the industry, career opportunities) although many feel that there is a lack of information available on career choices. In addition, little reliable compensation data is available to demonstrate the potential for career advancement in the industry at a supervisory or managerial level.

2. Compensation is perceived to be lower than in many other industries

Compensation in the accommodation industry is perceived by many career influencers—and some existing employees—as a less-than-motivating factor when comparing accommodation occupations to other career choices. While the industry, like most, does include some lower-paying positions, overall compensation can be quite attractive—particularly at the management level and in many gratuity positions (e.g., food and beverage servers). In addition to wages or salary, a variety of additional benefits are common in the accommodation industry, including:

- Accommodation (e.g., staff residences in resort areas)
- Staff meals (most employees while on shift).
- Laundry and dry cleaning (management and sales/marketing staff).
- Car allowances (management and sales/marketing staff).
- Signing privileges (e.g., entertainment in hotel dining and/or lounge area).

Compensation levels in the management ranks of the Canadian accommodation industry suggest reasonably lucrative, longer-term career paths are available. Salaries, before taking into account bonus opportunities and industry-specific perquisites (e.g., the value of "live-in" arrangements), may be considered quite attractive.

Exhibit IV-2 presents compensation levels of selected management level positions within the Canadian accommodation industry.

As with salaried management positions, hourly wage rates paid to non-managerial/supervisory accommodation industry workers vary substantially by location, size and quality level of hotel, business volumes and related factors. The level of unionization in the given market area is also a factor in setting wage levels. Exhibit IV-3 contains a range of hourly wages for unionized hotel employees at several selected full-service hotels located in major Canadian cities.

Gratuities are a significant component of the total compensation package for many accommodation industry employees. For some positions, gratuities comprise the majority of earnings for a given position (e.g., bartender, food and beverage server). Gratuities are often shared among other employees in the operating department who, while integral to the customer's level of service, would not receive a gratuity directly (e.g., kitchen staff).

3. The nature of work in the accommodation industry

Given the breadth and scope of the Canadian accommodation industry, working conditions vary considerably by type/quality of hotel, level of unionization, geographic location and other factors. While profiling "typical" working conditions in the accommodation industry is difficult, some general characteristics of the workplace may be highlighted. These include:

- Shift work—As a 24-hour/day business, the accommodation industry relies on a significant component of shiftwork in most operating departments. In addition to the necessity to maintain a core staff complement throughout the day, seasonal variances in demand, as well as daily peaks (e.g., meal periods in food and beverage areas, check-in/out at the front desk) require additional staffing to ensure customer satisfaction. From the employee's point-of-view, shiftwork might entail working "split-shifts" (i.e.,

Exhibit IV-2 Annual salaries for accommodation industry managerial positions—Canada (1993)

	Average Annual Salary ¹ (\$)
General Manager	60,000
Assistant General Manager	40,000
Controller	45,000
Director of Human Resources	41,000
Rooms Division Manager	42,500
Front Office Manager	30,000
Executive Housekeeper	30,000
Director of Food & Beverage	41,300
Restaurant Manager	28,000
Executive Chef	44,990
Director of Catering	37,000
Director of Marketing	54,600
Director of Sales	40,000

Source: *Canadian Lodging Outlook*, Price Waterhouse and Smith Travel Research, November 1994

¹Average salaries vary considerably by hotel type and location.

two work periods of four hours or more in the same day) and/or a significant variance in the number of hours worked from day-to-day or from week-to-week.

- Guest interaction—Many accommodation industry positions are "front-line," entailing frequent guest interaction on a direct (e.g., front desk clerk) or indirect (e.g., contact with support service staff) basis. As a result, certain attributes are considered essential for front-line positions, including a positive, customer-oriented attitude and the ability to converse in English and/or French. One hotel general manager interviewed during the course of the study suggested "grace under pressure" as an appropriate characteristic for accommodation industry employees.

- Cultural influences—The accommodation industry attracts a variety of people from various cultural backgrounds and ethnic groups. Aspects of different cultures are brought to the workplace and, while usually compatible, can sometimes cause tension between various employees. Receptivity to culture awareness programs is considered a must-have criterion for accommodation industry employees, particularly in major urban centres where new immigrants to Canada are most likely to locate.
- Age—As a significant proportion of accommodation industry workers are young (i.e., under 25) and in many cases employed on a part-time or seasonal basis, while attending school, employers are sometimes faced with motivational and logistical (e.g., scheduling)

Exhibit IV-3

Examples of hourly wage ranges at key positions in selected full-service, unionized urban hotels—1995

	\$/Hour ¹
Rooms/Front Desk:	
Housekeeper (Light duty cleaner)	8.00 to 11.00
Bellperson ²	6.00 to 8.00
Telephone receptionist	8.50 to 10.50
Front Desk Clerk	7.00 to 12.00
Food and Beverage:	
Chef de Partie	11.00 to 15.00
Dish/Pot washer	7.00 to 10.00
Food server ²	Minimum wage to 9.00
Bartender ²	Minimum wage to 12.00
Other selected positions:	
Laundry attendant	7.00 to 11.00
Maintenance worker/mechanic	10.00 to 15.00

Source: Various union contracts and KPMG research

¹Wages shown are for major urban hotels. Wages paid in smaller properties or in smaller communities/more remote locations may vary substantially.

²Compensation for this position includes gratuities, which may account for a substantial portion of total compensation.

issues. Many younger employees in the industry take accommodation positions as a "stepping-stone" to occupations in other industries.

Therefore, for a large number of employees, the accommodation industry is viewed as transient and, given the nature of the industry, a "fun" working environment.

In addition to the items noted above, the industry experiences high rates of turnover. While stability in some operating departments and in some geographic areas is more pronounced than others, turnover does have an impact on the longer-term human resource management practices. Turnover is the subject of the next section.

C. TURNOVER

Of particular concern in assessing human resource development and training issues is staff turnover. While recognized as an issue, employee turnover in the accommodation industry is regarded by many employers—and employees—as a systemic characteristic of the industry—a "given." Exhibit IV-4, contains a breakdown of job tenure for employees across all Canadian industries. As shown in the exhibit, the "service" industry—which includes accommodation—is among the shortest of all industries and well below the national average. Of all sub-components within the service industry, only food and beverage has a shorter tenure (38.6 months) than accommodation (55 months).

Exhibit IV-4
Job tenure by industry—1994

	Average Job Tenure ¹ (Months)
All Industries	94.9
Agriculture	195.4
Other Primary (forestry, mining, etc.)	105.0
Manufacturing	107.4
Construction	79.5
Transportation	121.0
Trade (Wholesale & Retail)	72.8
Finance (including Insurance & Real Estate)	96.5
Service Industries	82.6
Food & Beverage	38.6
Accommodation	55.0
Amusement and Recreation	55.9
Personal and Household Services	58.4
Business Services	72.4
Membership Organizations	81.5
Health & Social Services	100.6
Education Services	122.6
Other Service Industries	64.3
Public Administration	124.9

Source: Statistics Canada, Labour Force Survey, Annual Averages, 1994.

¹Length of time with current employer, regardless of the number of positions held.

Exhibit IV-5 contains a further breakdown of job tenure showing the proportion of accommodation workers and all employed persons in Canada within selected time periods.

One possible explanation for the level of turnover—as defined in Exhibit IV-4 and IV-5—is the age profile of the accommodation industry workforce. As discussed in Chapter III, 27% of accommodation industry employees are under 25 years of age¹² compared with 16.7% across all industries. Statistics Canada data shows that the average job tenure for all Canadian workers under 25 years of age is 19.4 months, compared to 78.5 months for those 25 to 44 and 166.4 months for those 45 and over. Given the accommodation industry's high proportion of young workers, the level of turnover is not surprising nor inconsistent with national job tenure trends by age.

The Institute de tourisme et d'hôtellerie du Québec (ITHQ) completed a study in 1995 that addressed current career paths of students who graduated between 1987 and 1991. The study found that almost 70% were still employed in the industry, 17% were employed in another industry, 7% had returned

to school and 6% were participating in other activities. Even among those remaining in the industry however, turnover levels were quite high with respondents having—on average—3.1 employers since graduation (i.e., with between four and seven years in the workforce).

The IHA study, referred to in Section B, also surveyed hotel school graduates who had entered the accommodation industry, but had left after more than two years, to determine the reasons for not staying in the industry. Similar to the ITHQ study, some 60% of the original entrants were still employed in the industry. Of those no longer employed, 39% were dissatisfied with their jobs comprised of three main reasons for leaving: “disliked employment conditions” (25%); “little opportunity for career advancement” (9%); and “disliked the work” (5%). Exhibit IV-6 summarizes the results of the IHA study.

Among the independent and chain hotels interviewed during this study, estimates of turnover for full-time employees ranged from almost none (e.g., over a three-year period for a 400-room chain-owned/

Exhibit IV-5 **Job tenure in accommodation¹**

	Percent of People Employed in Accommodation	Percent Of People Employed In Canada
1 - 3 months	17.9	9.4
4 - 6 months	10.1	6.0
7 - 12 months	9.0	7.2
13 months - 5 years	33.1	29.2
6 - 10 years	16.9	18.6
11 - 20 years	9.5	18.5
Over 20 years	3.9	11.0
TOTAL	100.0	100.0

Source: Statistics Canada, Labour Force Survey, Annual Averages, 1994.

Note: Percentages may not add due to rounding.

¹Length of time with current employer, regardless of number of positions held.

¹² 26.4% for Hotels & Motels and 31.4% for Other Accommodation.

managed hotel) to about 15% per annum for the balance of both independent hotels and chain operators. Turnover rates for part-time and seasonal employees were estimated to be as high as 50% per annum.

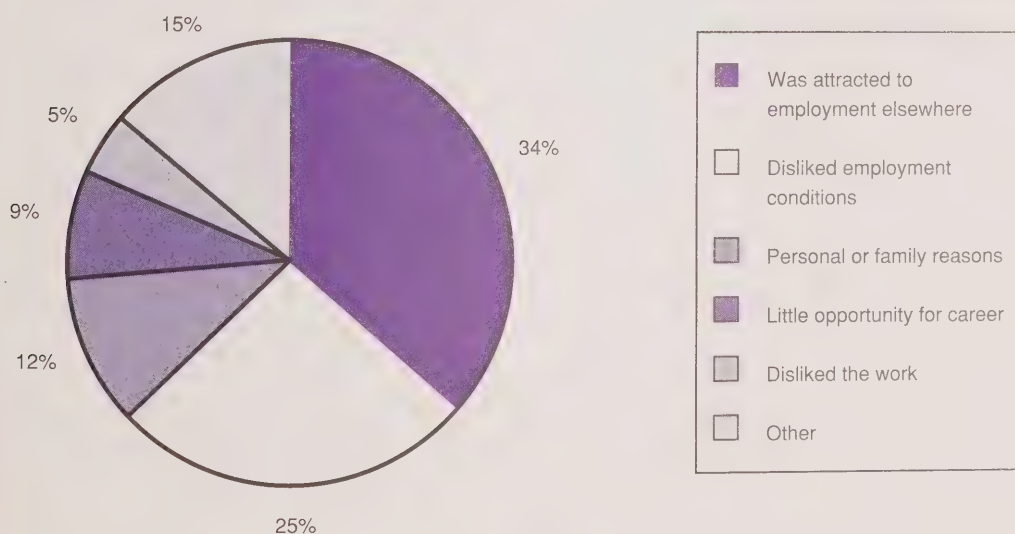
The negative aspects of turnover identified by industry representatives interviewed included the cost and time required to hire, retrain and reorient new staff on-the-job while attempting to maintain "seamless" customer service. Despite identifying these negative aspects however, little or no effort had been focused on quantifying the impacts either on customer service or on the financial performance of the property. Further, in some cases, turnover was viewed more positively.

"Turnover is not always a bad thing." — Director of Human Resources for a national hotel chain.

The positive aspects of a certain degree of turnover, as identified by accommodation industry interviewees, included the ability to provide staff with advancement opportunities, a desire for "fresh faces" in certain positions (e.g., front desk, food and beverage service) and as a means to reduce labour costs by replacing higher-wage, longer-term employees with new entrants.

While no definitive point has been identified where "some turnover" becomes "too much turnover", the point at which provision of seamless customer service is affected is the likely watershed mark. In other words, a sufficiently-large core of longer-term, well-trained employees is seen to be necessary in all departments to mitigate against turnover becoming a problem in day-to-day operations.

Exhibit IV-6 Reasons for not staying in the hospitality industry



Source: *The International Careers and Choices Survey*, Dr. Kate Purcell, Oxford Brookes University, U.K. and the International Hotel Association, 1994.

D. STAFFING

Staffing needs for individual businesses within the Canadian accommodation industry are a function of volume and, as such, can vary substantially by season, day of the week or from year to year. Fluctuations in staffing levels are particularly noticeable in those occupations that are highly dependent on business flow (e.g. housekeeping, food and beverage servers). Various areas of concern with regard to staffing are identified below.

1. A positive, service-oriented attitude is a prerequisite

An employee's attitude and previous work experience tend to carry much more weight in a hiring decision than formal and/or informal education and training. A positive attitude is a key—usually "must have"—criterion at the point of hire.

"We completely restaffed a hotel that had been closed for several years. Attitude was the first and most important criterion we considered in assessing each applicant." — V.P. Human Resources, Canadian hotel chain.

The required technical skills for most positions may be taught on-the-job according to the majority of employers. While formal education and/or structured training programs tend not to be an advantage at point of hire, such education and training are viewed—by employee and employer—as highly advantageous for advancement once hired.

The emphasis placed on attitude by potential employers should be given due consideration by educational institutions in both the selection of new students to hospitality programs and the development of course content for these programs.

2. Some employment growth is anticipated

While variances may occur from time to time, given economic circumstances (e.g., changes in the value of the Canadian dollar), modest employment growth in the accommodation industry is a reasonable assumption—particularly when compared to the food and beverage sector. The rationale for the

assumption of modest growth as determined in Chapter 3—in addition to the data summaries provided through COPS (Canadian Occupational Projection System) and when compared to the food and beverage sector—is that the Canadian accommodation industry is still experiencing a supply-demand imbalance (i.e., occupancy rates well below effective capacity) in most market areas. Further, existing staffing levels—either through greater productivity of full-time staff or conversion of some part-time staff to full-time employment—are capable of absorbing some increases in demand.

While rapid employment growth for the industry as a whole is not anticipated, shortages in certain positions may be more likely, based on interviews with employers. As previously discussed, some members of the Steering Committee felt employment growth prospects may be somewhat more bullish than indicated by the allocation of the COPS projections. The consulting team's use of a 1.1% growth rate for accommodation—compared to 3.5% projected by COPS for the combined accommodation and food and beverage sector—is based on historical growth patterns for the accommodation subset.

The occupations in which employers identified shortages of qualified applicants in certain occupations as a perennial problem included:

- Chefs.
- Experienced line cooks.
- Sales managers.

Shortages of qualified chefs and cooks appear to be an issue both across Canada and internationally. In fact, many graduates of Canadian culinary programs have successfully looked overseas for positions upon graduation. Almost all interviewees identified these positions as being the most likely to provide recruiting and retention challenges in the future.

"We will have to source chefs from offshore or from quality restaurant operators elsewhere in Australia."— General Manager - chain hotel in Sydney, Australia.

The cyclical nature of the accommodation industry is likely to create both short- and long-term staff shortages in occupations other than food preparation.

For example, seasonal shortages—particularly in resort areas—will always pose a recruiting challenge although steps may be taken to plan in advance for such shortages. Improving economic conditions however, have frequently resulted in a significant transfer of employees out of the accommodation industry and into other—often higher-paying—sectors such as construction. The periods of rapid economic growth experienced in Toronto (mid to late 1980's), Calgary (late 1970's and early 1980's) and Vancouver (late 1980's and early 1990's) saw many accommodation industry employees enticed to other industries—albeit often on a short-term basis—through higher compensation and more attractive hours. As a result, accommodation industry operators were faced with a much smaller pool of potential employees to fill open positions.

Ensuring accommodation industry employees view the industry as a longer-term career choice will substantially reduce the likelihood of transfer to other sectors. However, changing this perception will require much greater attention to those human resource practices that build loyalty, increase job satisfaction and adequately compensate employees.

3. Staffing levels vary internationally

A somewhat dated issue of the Travel and Tourism Analyst (1990) suggests that the "average" number of employees in the world's hotels is 99.4 per 100 rooms—ranging from a low of 44/100 rooms in Scandinavia to 158/100 rooms in Asia. The benchmark in North America has traditionally been assumed to be about 100 employees per 100 rooms. In those countries affected by the recession of the early 1990's, these averages have almost certainly been reduced, by what degree is unknown, although a reduction of 10% or more would not be unrealistic. A reduction in the employee count will vary based on the level of quality and service and the physical amenities of the property.

While the staff to room ratio in Asia, for example, is portrayed as a strong selling feature to consumers, such ratios will never be attained in North America given the cost of labour. As a result, a focus on raising the abilities, skills and efficiency of existing employees should be the priority.

E. EDUCATION AND TRAINING

The terms "accommodation industry education (or education)" and "training" are often used interchangeably. For the purposes of this analysis, "education" is defined as a formal, in-school learning experience, the successful completion of which results in a degree or certificate. Education in this analysis is further defined as post-high school and focused specifically on aspects of the accommodation industry, or a related field. Training, on the other hand, denotes a variety of on-the-job, off-site and institutional training conducted on a task-by-task or subject basis. Based on these definitions, almost all accommodation jobs require some form of training, but far fewer require formal education.

1. The needs

Of the approximately 180,000 accommodation industry (SIC 91) jobs identified in Exhibit III-7, 50% or more are suitable for those individuals at or below the high school graduation level, according to the majority of employers interviewed¹³. Further, only 36% of accommodation industry jobs require college certificates or university degrees, according to these same employers. The number of accommodation jobs currently requiring formal education is an important consideration in planning and providing educational programs across the community college and university spectrum in Canada. Further, the majority of employers interviewed saw little change in these requirements in the future. However, employers believed that high school educational content could be broadened to provide graduates with an enhanced level of core skills.

¹³ Although all of the employers interviewed owned and/or operated businesses classified as hotels or motels (SIC 911), interviewees and the Steering Committee felt the responses could be regarded as at least somewhat representative of the broader industry given the similarities of positions.

Growth in the number of jobs requiring formal education should be an important concern in determining the number and type of formal education programs. Exhibit IV-7 identifies the occupations that the independent and chain hotel owners/managers interviewed felt required college or university degrees. The anticipated growth in the number of people employed in these occupations is based on the COPS projection (Exhibits III-7 and III-15), and additional detail provided in Appendix E-3.

The figures contained in Exhibit IV-7 reflect the growth in the number of people employed over and above the impact of employee turnover. As a result, the potential total demand for employees in these positions will be higher than the 7,400 identified in Exhibit IV-7. The precise number is difficult to determine due to the lack of information on turnover rates by position, or within the overall industry.

Those jobs perceived as requiring little or no formal hospitality-specific education (e.g. light duty cleaners, food and beverage servers) have more basic education and training needs than more technical jobs (e.g., chefs) or managerial positions. A prerequisite for on-the-job training is

the ability to communicate usually in English and/or French, although even this basic requirement is sometimes difficult to achieve given the number of people in the industry whose mother tongue is neither English nor French. For most of the positions not requiring formal hospitality-specific education, elements of training programs already exist (e.g., self- or group-study manuals, videotape training packages). A recent Holiday Inn Worldwide study found that of those tasks comprising most front-line hotel jobs, 80% of the tasks are the same around the world. The remaining 20% are a function of local culture. This finding suggests that little emphasis should be placed on developing new training programs for the large majority of tasks related to front-line jobs. Rather, the emphasis should be on determining how to assist with identifying and developing proficiency with the remaining 20%.

Whether learned through formal, high school-level education or through task-specific training approaches, the desired accommodation employee of the future—at all levels and job types—will need to have a more enhanced skill base. The enhanced skill base might include some or all of the following:

Exhibit IV-7

Accommodation industry jobs requiring higher education—current and projected to 2005

	Current Employees	Net Growth to 2005
Accommodation managers	17,705	2,400
Accounting clerks	2,990	400
Chefs	2,665	400
Cooks	9,560	1,300
Executive housekeeper	1,710	200
Front desk clerks	11,640	1,600
Program leaders ¹	2,420	300
Receptionists	2,465	300
Restaurant managers	3,965	500
Total	55,120	7,400

Source: Derived from Human Resources Development Canada, COPS projections and interviews with accommodation industry operators.

¹Includes such jobs as recreation co-ordinators and special events organizers.

- Computer literacy
- Problem solving
- Task orientation
- Advanced communication skills
- Positive attitude
- Assertiveness
- Multi-lingual capability
- Sales orientation

Growth of multi-skilling will likely see a further broadening of the skill base of individual accommodation industry employees. Multi-skilling—and mobility between positions at different hotels within the same chain—improves the desirability of the job.

2. The need for and approach to training and education

On-the-job training is an ongoing reality. Most operators interviewed during this study relied extensively on in-house training for occupations below the managerial and supervisory level, whether at the point-of-hire or for existing employees. For non-managerial and non-supervisory employees, on-the-job training includes programs oriented towards core job tasks (i.e., basic job description), desirable—although optional—employee development initiatives (e.g., workplace safety) and organizational culture (e.g., service style, customer appreciation). On-the-job training is favoured for a variety of reasons, including:

- A perception of being less expensive while affording the owner/manager greater control and flexibility (e.g., training may be interrupted to cover busy shifts as required). While almost certainly less expensive, the long-term effectiveness of such widespread application of on-the-job training might be questioned. For example, how effective is the trainer? How conducive is the setting for quality training?
- The reliance on hiring employees with past accommodation industry experience. As a result, on-the-job training is focused on orienting newly-hired, "experienced" employees to those unique characteristics of the property (e.g., computer system commands, foodservice ordering procedures, room preparation checklists).

- The implementation of custom, in-house, on-the-job training programs as a means of differentiation and competitive advantage. In-house training can be used not only to improve skill levels but also to shape organizational culture. For both skill improvement and indoctrination to a new culture however, the reliance on hiring employees with previous experience sets the tone for the type and nature of training.

On-the-job training will likely remain a leading training delivery method in the accommodation industry. Employers interviewed for this study suggest that the occupations best suited to on-the-job training include those with a significant proportion of routine tasks (e.g., housekeeping, some kitchen/stewarding functions) and those with limited direct customer contact. Some concern was raised among these same interviewees that on-the-job training might be receiving too much emphasis as a training tool, particularly in situations where employees are learning at the guest's expense.

Employees also tend to prefer on-the-job training because it enables them to earn income while learning.

"If I couldn't earn a wage while training here, I'd be doing something else." — Food and beverage server at a large urban hotel.

Few linkages are evident with educational and/or training institutions for the provision of in-house training. Some packaged and modularized training materials exist in either hard copy or electronic format. One of the largest developers of such packaged training materials is the Educational Institute of the Washington D.C.-based American Hotel and Motel Association (AH&MA). While these materials are often used by both American and Canadian chain hotel operators as a base, most in-house training at chain hotels is developed—or customized—at the property level or at national/regional support offices. For independent hotels, most training materials and/or programs are developed or acquired on an as-needed basis.

Recently, Spectravision—one of the accommodation industry's largest providers of in-room movie services—has teamed up with the AH&MA to offer training modules on video. The objective of such an approach—in addition to the commercial value for AH&MA and Spectravision—is to make "user-friendly" training materials available on a much broader scale. Given the results of the Holiday Inn Worldwide study that found 80% of the tasks undertaken by accommodation industry employees in front-line occupations are the same around the world, these generic modules developed by AH&MA and distributed by Spectravision may see fairly wide acceptance.

While some in-house, on-the-job training is required for all positions, in-house training is not the only education/training requirement for some occupations. The development of specialized skills (e.g., food preparation, accounting, program management) requires external training in a formal or informal setting, in addition to on-the-job training and/or some other form of practical experience. With regard to managerial and to a lesser extent supervisory level employees, the employers interviewed during this study were generally positive on the value of formal, hospitality-specific education. Many made training materials available to employees on a "loan" basis. Some provided optional seminars and more structured training programs on-site. Still others were supportive—including being financially supportive—of employees participating in either community college/university hospitality programs or other professional development programs focused on developing broader managerial and technical competence. However, little continuity exists across the industry. Some major chains and independent properties were generally supportive of a wide variety of such initiatives while others—both chain and independent—showed little interest in the area.

Formal education vs. on-the-job training. Several hundred accommodation and/or tourism programs are offered in Canada at the community college or university level. However, a general concern exists—primarily among employers, employees and some hospitality program students interviewed for this study—that many of the skills taught in a classroom setting would be better left to on-the-job

training. The rationale for these concerns includes the:

- Practical experience gained from in-house, on-the-job trainers.
- Applicability of some course curricula and the ability of instructors to remain current on industry trends.
- Lack of up-to-date technology with which to train (e.g., front desk computer systems, telephone switchboard).
- Cost to the student of formal training in relation to the industry's current compensation structure.

Interviews with employers and employees suggest that formal education programs are best directed at food and beverage preparation, various front desk positions, general management and specific functional areas (e.g., convention management, marketing). Most interviewees believe that the specific and general skills learned in these types of programs are advantageous to the industry and the student.

"The potential employer is our 'customer', not our students." — Educator.

The need for graduates of formal education programs is not expected to increase significantly. Despite the projected growth (Exhibit III-13) in the number of people employed in positions requiring formal hospitality industry education—for example the net increase in accommodation managers (2,400), chefs and cooks (1,700), and restaurant managers (500)—the proportion of these positions to total accommodation industry positions is relatively small. Even after taking into account possible turnover in the industry, growth in demand for employees requiring formal education in the accommodation industry is expected to be modest.

Few training and education opportunities exist for the owner-managed business proprietor. Most formal education and training programs are geared towards new entrants in the industry. The Canadian accommodation industry includes many owner-managed businesses of a size and scale such that the owner is responsible for almost all management and supervisory aspects of day-to-day operations. Education and training programs developed

specifically for these individuals in areas such as human resources management, financial management, marketing, business planning and the like are relatively rare. Further, the need for the owner/operator to be present at the facility on a day-to-day basis limits the ability to participate in full-time programs outside the workplace. As a result, alternate methods of providing these operators with training (e.g., interactive CD modules) and in identifying both the availability and importance of standards and certification for their staff should be given some priority.

3. Views on existing formal education programs

The opinions of employers—and to a certain extent some students and employees—are mixed regarding the quality and applicability of education and training programs currently available in the accommodation industry. Further, many employers are either unaware of the large and diverse number of programs or are confused about how to evaluate the quality of such programs and program graduates. Some Canadian universities and colleges have developed wide-spread reputations for the quality of accommodation programs offered (e.g., University of Guelph). Despite these positive examples however, employers—the ultimate "consumer" of program graduates—often question the relevance and quality of course content and the suitability of instructors at many institutions. Appendix F contains a reasonably comprehensive list of program offerings.

Too much emphasis is placed on new entrants to the industry. Employers, employees and students believe too much emphasis has been placed on developing, funding and providing programs for new entrants to the accommodation industry as opposed to existing employees. The financial support at the federal and provincial level for development of hospitality industry training programs appears to be based less on demand by students and more on the interest of governments and institutions to offer such programs. Part of the cause of this situation may be the tendency for various government agencies to focus on "quick fix" solutions to retraining problems.

This situation is particularly acute in former resource communities (e.g. mining, forestry, fishing) where tourism has been identified as a means of economic renewal and a potential creator of new jobs. Collecting unemployment insurance benefits is contingent on enrollment in training programs. The suitability of these program participants for accommodation industry jobs is questionable, particularly in light of hiring criteria as stated by employers interviewed for this study. For example, many employers identify a service-oriented attitude as a key hiring criterion.

More "real world" work experience is required in tandem with education. Many university and college students interviewed for this study complained about the lack of real world job experience during their education. If provided at all, such work experience was often viewed by students as an opportunity for employers to access lower-cost labour. In other cases, the relevance of the work experience is questioned in relation to the educational focus.

"All they want is cheap labour and for us to do the horrible tasks they're afraid to ask the full-time employees to do." — Student at private-sector training institution commenting on a recent work placement.

From the employer's point-of-view, the demand by educational institutions for placement opportunities far exceeds the availability of supply. This situation results, in part, from the volume of students currently in formal accommodation industry, educational programs and a lack of synchronization between high-season demands of the industry and the traditional school year. The latter has been addressed by more progressive educational institutions as a means of providing greater work term opportunities for students. For example, the school year for the University College of the Cariboo's tourism programs has been adjusted to ensure the greatest potential placement opportunities for students.

Changes are required in the structuring and formatting of programs offering work experience in the accommodation industry before the benefits of this necessary building block to effective human resource development are realized. Employees

need to feel that the tasks being performed during the work experience phase of the program are a meaningful addition to classroom training. A cost effective approach to compensation from the employer's point-of-view needs to be balanced with the students' need for reward and reinforcement.

Student awareness of what the industry is "really like" varies among students both within and between individual institutions. Those students with past work experience and those motivated by "softer" factors than compensation tend to be more aware of average working conditions. However, as a general rule, perception of advancement opportunities is at least optimistic, if not unrealistic.

"They arrive here thinking that becoming General Manager is a two-year career objective." — Owner of small rural hotel in Western Canada.

From the students' viewpoint past accommodation industry work experience is seen as a necessary requirement for sourcing long-term employment.

Those with past industry experience tend to have much more realistic expectations of the nature of accommodation jobs, compensation practices and work requirements.

Suitability of applicants should be considered.

Many universities and colleges, faced with excess demand for accommodation programs, have instituted forms of screening to select "appropriate" students for accommodation courses. The screening criteria include past work experience, aptitude, career plans and interviews/reference checking with local industry leaders. Rarely is attitude screened or even considered.

"Some people are just not suited to this industry." — General Manager.

Such attempts to screen prospective students have had varying degrees of success. In those with higher success rates, an integral component of the screening process is in the student interviewing an industry spokesperson (e.g., hotel manager, chef). Both the spokesperson's and the prospective student's interview notes form part of the material evaluated prior to a decision on admission.

Concern over the applicability of existing accommodation programs. A great deal of concern exists over the "real" input into the development and

applicability of course content. While most university and college accommodation programs have a roster of external advisors consisting of local industry professionals, the amount of time spent by these advisors in development and review of course content is limited by other time demands. As a result, both students and employers are concerned about the applicability and suitability of course content on issues ranging from availability of up-to-date technology through to supervisory skills. More active involvement of these external advisors is necessary to gain real-life input into curricula development, the ability to offer practical work experience and ultimately assist in locating employment for the graduate.

Student perceptions of instructor suitability varies.

Students interviewed expressed some concern over the balance of practical industry experience and academic theory offered by course instructors. Many students believed the lack of recent work experience had a negative impact on the instructor's ability to address workplace application of theory. Although many institutions employ a limited number of instructors from industry on a part-time basis, most do not require periodic work experience, sabbaticals or certification for full-time instructors.

F. CAREER PATHS

As with most industries in Canada and internationally, the "traditional" career path in the accommodation industry has undergone significant change over the past few years. Such changes have resulted from a variety of factors including a necessity to reduce costs by eliminating middle management, improving customer service by ensuring those employees with front-line customer contact have greater decision-making authority (i.e., empowered to meet guest needs without seeking secondary approval) and the impact of ownership changes in the industry. Much of the ownership change has been brought about as a result of financial difficulty experienced by hotel owners and/or operators.

1. The impact of owner-operated businesses

As measured by the number of businesses—as opposed to number of hotel rooms or number of employees—the accommodation industry has a very large number of owner-managed enterprises (e.g., small hotels/motels, small inns/lodges, rural resorts,

bed and breakfasts). As such, management is often comprised solely of the owner's family members and associates. Depending on the size of establishment, some additional scope for management and supervisory personnel is possible. However, these are relatively rare situations.

Many students interviewed expressed a strong interest in such small-scale businesses—either as an employee or as a long-term ownership goal. Many of these students, however, wished to enter the industry through a larger accommodation business or chain as a means of gaining a wider spectrum of experience. For these students, supervisory or middle management positions are a medium-term objective. As a result, some independent operators—possibly even those of quite large hotels—are likely to find attracting new employees somewhat difficult.

The ability of an employee to transfer between hotels located in different cities but part of the same chain is tempered somewhat by the growth of franchised operations. While relocation at the senior and some middle management levels continues within national and international hotel management companies, this situation is relatively rare within franchised operations.

2. Hierarchical organization structures are being delayed

Many major hotel chains and large independent hotels have implemented delayering programs focused on eliminating several management and supervisory positions. The number and scope of management trainee programs have also been reduced, recognizing the reduced number of openings for those successfully completing the program. The primary underlying factor for such reductions has been cost containment. However, with a reduction of cost as the catalyst, some accommodation operators have seen re-organizing the management ranks as an opportunity to enhance customer service, by eliminating layers between the customer and service providers (i.e., decision makers).

Of particular interest is the "clash" between the traditional organization structure and the flow of customers. Accommodation businesses are typically managed on a vertical, functional basis. Customers, on the other hand, move through the hotel or other accommodation business on horizontal basis from

department to department (e.g., rooms, food and beverage). As a result, a process to continually co-ordinate the interface of these two directions is required. A more efficient organization of the future will likely reflect processes directed at consumer-use patterns. Such a change is unlikely to occur rapidly, but rather through a series of incremental changes brought about by dissemination of success stories across the industry.

Shifts away from a hierarchical structure will have various implications for employers, employees and labour organizations. For example, unions will increasingly be expected to work with both employers and employees to ensure a smooth transition between organizational structures. Flexibility on the part of employees, employers and labour organizations will be a key requirement.

If employees are to be empowered, their decision-making skills will need to be enhanced. The role of the human resource function at both the property and head office level will need to be broadened and given greater prominence in order to support these new initiatives and to ensure suitable candidates are trained and hired.

3. Position descriptions are being broadened

Somewhat related to delayering, position descriptions are becoming broader, incorporating a variety of skill sets and responsibilities. Core skills—including communication (interpersonal skills), teamwork and analytical abilities—will be necessary for a larger variety of job types. As a result, an expectation exists that the accommodation industry will require employees with more than high school education in a variety of front-line positions, a significant difference from past trends.

In addition to the need to acquire new core skills, employers will be looking to broaden the range of tasks associated within a given position. Multi-skilling is already being implemented in various accommodation businesses across Canada. At a unionized Vancouver hotel, for example, the bellperson, concierge and doorman positions have been rolled into one "guest services" function. Multi-skilling and cross-training may also be used to motivate employees (through increased job satisfaction and variety) and may allow more part-time employees to work full-time.

G. INDUSTRY CO-ORDINATION AND SUPPORT

A very large number of associations claim to represent both the broader tourism industry and the accommodation industry. These associations are clustered based on facility type (e.g., hotels, motels, resorts), geographic orientation (e.g., national provincial, regional), and functional area (e.g., marketing, human resource development). Many of these associations have common mandates, overlapping membership bases and are in competition for government funding and private-sector financial support.

Within the human resource area, numerous initiatives have been initiated or are being planned at either the national and/or regional level. The impetus for these initiatives ranges from availability of funding to an interest championed by a board member, local industry leader or government. Interviewees, particularly employers and educators, suggested a number of areas where greater co-ordination—at a broader level—would prove beneficial to furthering human resource development in the Canadian accommodation industry. These areas include:

- Determining human resource development priorities at the national and regional level.
- Standardizing the timetable for occupational standards and certification between provinces.
- Identifying the appropriate body to lead human resource development initiatives.

A brief discussion of these suggestions follows.

1. Co-ordination

The Canadian Tourism Human Resource Council (the "Council") was formed in 1994 to co-ordinate human resource development and training initiatives on a national basis. The role of the national and provincial councils is one of co-ordination among trainers, educators and employers. They also act as a broker between industry and the public sector (government and education) to ensure that tourism gets maximum benefit from public sector programs.

Prior to formation of the Council, similar organizations were formed at the provincial level. The Pacific Rim Institute of Tourism (British Columbia) and the Alberta Tourism and Education

Council are two of the oldest and strongest provincial advisory councils in existence. Since then, one council or de facto council has been created in each province and territory across Canada. Provincial and territorial councils make up 1/3 of the board of directors of the national council where there is a strong spirit of co-operation. Some provincial initiatives are much more advanced than others—largely a result of funding support at the provincial level. The Council has been working with its provincial counterparts to ensure tools with cross-Canada application (e.g., standards) are made available on a broad basis. The continuance of this role should be given some priority.

A general trend—at various stages of implementation on a province-by-province basis—is the move towards greater self-sufficiency by the provincial education councils. Self-sufficiency in many provinces has—or will—be a function of declining provincial government financial support. Such moves will almost certainly create the need for revenue-generating projects and programs. A very real concern of educators, and to a lesser extent provincial accommodation associations, is that the drive towards financial self-sufficiency will move provincial councils—and potentially the national Council—into the training provision "business" and away from their historic role of co-ordination and facilitation. By way of example, Tourism Training Australia (the Australian equivalent to the Canadian Tourism Human Resource Council, in operation for several years) is embarking on a business plan to sell curricula developed internally, together with Australian standards, to overseas countries. While such initiatives may offer a great deal of interest, co-ordination and facilitation should remain a priority of the Council to ensure follow-through on national standards and certification.

The Hotel Association of Canada (HAC) and the provincial accommodation associations also have a role to play in providing industry co-ordination and support. The HAC, as the umbrella organization for all provincial accommodation associations, also includes among its members almost all of the major hotel chains in Canada. As a result, this organization is best situated to act in the role of catalyst, advisor, and co-ordinator. The HAC also sits as a member of the Board of Directors of the Canadian Tourism

Human Resource Council along with seven other national associations. The provincial accommodation associations also sit on the boards of provincial councils.

2. Standards and certification

The development of national occupational standards and associated certifications—for all occupations in the Canadian tourism industry—is a key objective of the Canadian Tourism Human Resource Council, its provincial counterparts and both national and provincial industry associations. The process to date has seen a single organization—usually a provincial education council or a national industry association—take responsibility for developing an individual occupational standard. Once developed, the occupational standard is reviewed by industry through a nationally accepted validation process administered by provincial education councils and industry associations. Following validation by a minimum number of provinces/territories, the standard is amended as required and endorsed.

As of March 1995, four accommodation-specific standards have been endorsed nationally: Room Division Executive, Hospitality Housekeeping Executive, (promoted and delivered in Canada by the HAC on behalf of the Educational Institute of the AH&MA) Housekeeping Room Attendant and Front Desk Agent. Several other food and beverage standards, also applicable to the accommodation industry have been endorsed including Chef, Bartender and Foodservice Manager. A complete summary of the occupational standards and certification status may be found in Appendix D.

In addition to the national standards and certification process discussed above, other certifications are promoted through the Hotel Association of Canada. For example, the Hotel Association of Canada promotes the American Hotel & Motel Association's - Certified Hotel Administrator ("CHA"). HAC is also active in the development and delivery of training programs for cultural awareness—in conjunction with the Asia Pacific Foundation—and for disabled travellers through ACCESS Canada.

Interviews with employers, employees and students demonstrated a general lack of knowledge regarding the process of standards and the availability of certification for individuals. Few employee or student focus group attendees had any awareness of the process,

although they were generally in favour of the concept. Employers had somewhat more knowledge, although somewhat less receptivity to the value of certification (e.g., impact on employer's bottom line, worker productivity). The lack of awareness is largely attributed to the newness of the programs in most provinces. In those provinces where certification has been underway for a longer period of time however, both awareness and acceptance is much higher.

"Every one of the housekeeping staff has been certified. We pay them \$0.25/hour more upon certification, but the real value is the increased morale." — General Manager of small motel in Alberta.

Occupational standards are not unique to the hospitality industry, or even the Canadian hospitality industry. Canada however, is far ahead of the United States in this area. Australia and Great Britain are probably the most advanced countries in the implementation of standards, given the head-start in development and creation of national bodies to ensure co-ordination and implementation.

H. LANGUAGE, CULTURAL AND GENDER ISSUES

Issues of culture, gender and language proficiency are not unique to the accommodation industry. However, the structure of the industry and the nature of the employment base suggest that some issues may be more pronounced than in the Canadian workforce generally. For example:

- Almost one-fifth of workers in the accommodation industry have neither English or French as their mother tongue compared with 15% of the total Canadian work force.
- Women, particularly women over 25 years of age, represent a slightly higher proportion of part-time workers in the accommodation industry compared with other industries. Women also represent a larger proportion of the overall accommodation industry workforce when compared to all industries.
- Much anecdotal evidence suggests that certain occupations (e.g. light-duty cleaners) have high concentrations of specific ethnic groups—almost an employment "ghetto"—particularly in major cities such as Toronto, Montreal and Vancouver.

A brief discussion of these issues and the human resource implications follows.

1. Language issues

Exhibits IV-8 and IV-9 illustrate the oral language proficiency for the landed immigrants who worked in the accommodation industry in the year in which they obtained their landed immigrant status. Exhibit IV-8 shows the oral language proficiency of immigrants who landed between 1972 and 1992, at the time landed immigrant status was obtained.

Exhibit IV-9 shows oral language proficiency of the immigrants who obtained landed immigrant status in 1992 and worked in the accommodation industry in 1992. Worth noting is the smaller percentage of landed immigrants in the accommodation industry in 1992 who are unable to speak either official language compared to all landed immigrants who worked in the accommodation industry between 1972 and 1992 (21% in 1992 versus 37% between 1972 and 1992).

2. Culture and gender issues

Culture and gender issues are likely to include:

- A greying of the workforce, particularly a trend towards fewer employees in the 15 to 24 age group. The customer profile of the future will also

change accordingly, resulting in an increasing number of older travellers.

- An even greater proportion of multi-lingual, multi-cultural workers. Studies in the United States suggest that by 2005, more than two-thirds of new entrants to the accommodation industry will be non-white men and women.
- Levels of immigration to Canada will rise slightly in the near term, based on recent federal government announcements. However, the characteristics of the selected immigrants (e.g., language, education) may be inconsistent with certain employment needs of the industry.

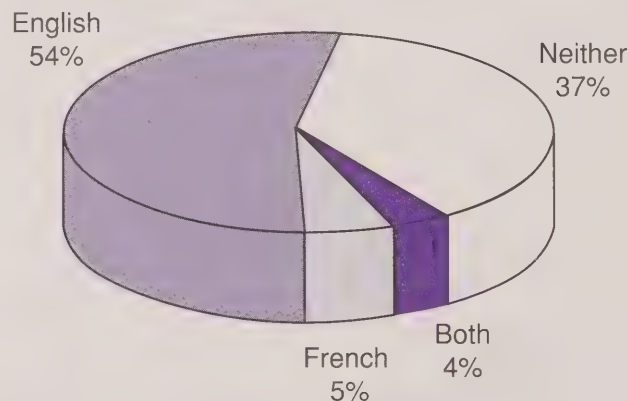
3. Implications

The implications of these cultural, gender and language characteristics with regard to human resource development initiatives focus primarily on communication, training and motivational requirements. Specific concerns and implications include:

- The difficulty in training those employees with limited proficiency in oral or written English and/or French. Basic language skills may be required either at the property level or accessed through local community sources.

Exhibit IV-8

Oral language proficiency, 1972 to 1992-Landed immigrants between 1972 and 1992 who worked in the accommodation industry



Source: Labour Immigration Data System.

- A shrinking labour pool (i.e., 15 to 24-year olds, immigrants) suggests that the industry will need to identify new sources of employees over the medium term.
- The need for sensitivity training to address the cultural differences among employees. Guest prejudice towards employees should also be a component of sensitivity training.
- An appreciation of the impacts of raising a family—particularly given changing hours of work—is a concern. Day care or related facilities may be necessary in some cases (e.g., in more remote areas).

The accommodation industry's employee base is diverse, probably more so in major urban areas. Consideration of these issues in such a diverse workplace is crucial to creating an attractive career choice for potential employees.

I. THE ROLE OF ORGANIZED LABOUR

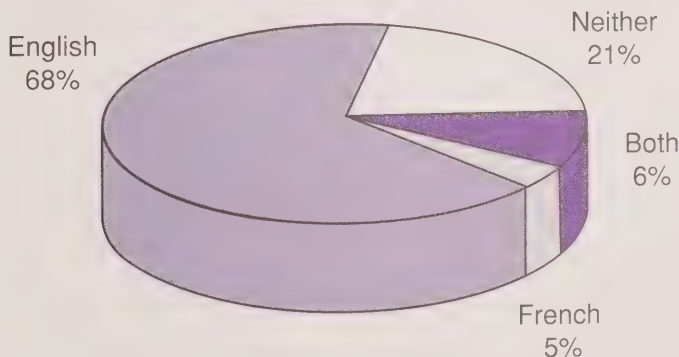
While labour's primary mandate is to represent the interests of union members, labour organizations will come under some pressure to consider new approaches to human resource management and development. The role of organized labour is evolving. Some labour organizations will likely be

more receptive than others to this changing role and the implications of issues ranging from job classification to the working environment.

The accommodation industry is increasingly being seen as a growth area for union membership, given the large employee base, somewhat transitory nature of the industry and perception of less-than-attractive working conditions. One union noted that new member growth attributed to the accommodation and food and beverage businesses was the largest of any industry over the past two years.

Organized labour views their role as one of protector. However, contrasting opinions exist regarding the best approach to safeguarding employee interests. At one end, labour believes that a partnership needs to be forged between the employer and the union, as representatives of the employees. At the other end, an adversarial role is believed to be a better approach with partnerships strongly discouraged. While past confrontations have not laid the best groundwork for future co-operation, examples exist where labour organizations have assisted in the development of innovative human resource practices (e.g., multi-skilling/shared job activities) that have benefited both employee and employer. A starting point in continuing this process is the recognition by both unions and

Exhibit IV-9
Oral language proficiency, 1992-
Landed immigrants (1992) who worked in the accommodation industry



Source: Labour Immigration Data System

employers that labour's stated concerns—the retention and growth of full-time employees—are not necessarily inconsistent with the need for a financially-successful business. Negative views towards such innovative human resource practices are very strongly held by some union management, however. Change will not occur rapidly.

Interviews with employees, students and employers suggested that:

- Most employees see organized labour as playing a key role in maintaining job security. However, some union contract provisions are seen as potentially restricting the provision of good customer service (e.g., strictly enforced job descriptions that might limit one employee from performing another's task at the request of a guest).
- Most students view the confrontational approach to management/labour relations as inconsistent with the provision of good customer service.
- Many employers view organized labour as a potential barrier to implementing change. However, examples exist where unions have co-operated with—or proactively encouraged—the need for change.

Most of the employees, students and employers interviewed were unsure of what role organized labour should play in the service industry of the future.

Leading concerns of labour organizations—identified through interviews—included:

- The need for more training initiatives are required at the sub-managerial/supervisory level. Training is viewed as an ultimate responsibility of the employer. Most labour representatives expressed cautious approval of employees participating in training programs on a time-share basis or completely free-time basis.
- The impact from students enrolled in education programs that offer work experience (e.g., co-op work terms) is a concern as these students are often perceived as reducing the hours available to union members.
- A growing reliance on immigrant staff and the need to identify those responsible for providing basic literacy skills to these employees.

- A focus on how to reduce turnover and how to ensure that processes to affect a reduction in turnover do not have a negative impact on existing employees.
- The ability to convert part-time positions to full-time positions. Union representatives generally believe that most part-time employees wish to work full time.

Most labour organizations interviewed expressed cautious interest in exploring "new" approaches to human resource management. While at least two union representatives were quite negative towards such innovations as multi-skilling, all others saw these proposals as methods to potentially enhance the image of accommodation careers, create more satisfied employees and convert more part-time positions into full time.

"Multi-skilling is key to ensuring job mobility. We see the approach to such measures as a partnership opportunity." — Union representative.

Bringing both labour and employers together will be an evolutionary process that will need to be built upon trust. That trust takes time to develop.

J. TECHNOLOGY

The service orientation of the accommodation industry—and an increasing trend towards a greater customer-service focus—will mitigate job loss and other potentially negative impacts from technology adoption. In most cases technology enhancements are viewed as tools to improve workplace efficiency and to support, not replace, workers.

"Hotels rely on three essential utilities: electricity, water and computers." — Technology supplier.

This opinion is generally held by employers, technology suppliers and labour organizations. The (British Columbia) Hotel, Restaurant Culinary Employees & Bartenders Union recently undertook a study to investigate the likelihood of job losses resulting from the application of technology in the accommodation industry. The study found no significant areas of concern for its members.

However minimal, interviews undertaken for this study suggest that some job loss is inevitable. The departments most likely to experience reductions include:

- **Reservations/Switchboard**—a result of the growing use of voice mail (reducing the need for "live" operators), in-room fax capability, wider electronic linkages to reservation systems (at both the travel agent and guest level) and the growth in centralized reservation service providers.
- **Maintenance**—based on increased use of electronic property maintenance systems. Such systems are capable of monitoring heat, light and security and making pre-programmed changes. Introduction of such systems, however, will also require availability of highly-skilled technicians, possibly on a contract basis.
- **Food and beverage**—Some current advances permit the consolidation of production through cook/chill and cook/freeze processing. While fairly common in institutional food service, this relatively high cost technology has not to date penetrated the accommodation industry in a significant way.

Some broader technology-related human resource issues have also been identified by technology suppliers and users, including:

- **Technophobia**—the difficulty in teaching older employees basic computer access skills.
- **Leveraging information**—focusing on teaching managers to use the "output" more effectively. For example, what can be done with the customer database file to market the hotel more effectively? How can it be tied to the reservation system?
- **Efficient use of technology**—free up more time for managers and employees to interact with guests and each other.
- **The ability of educational institutions to keep up**—leading-edge technology is often not available to educational institutions. In fact, educational institutions often are the recipients of "old" hardware that has been upgraded.

The challenge for the accommodation industry will be how to generate the greatest benefit from new electronic technology (e.g., front desk systems, reservations networks). While basic training is provided by most technology providers at point of sale, discussions with employees suggest a great deal of on-the-job learning occurs without a structured

lesson plan. Some technology providers incorporate training in the end price as a key differentiating factor, offering innovative training modules for an annual fee that includes follow-up and retraining in the event of staff turnover.

K. SUMMARY

The Canadian accommodation industry faces a variety of issues in attracting, training and keeping the right employees. Some issues are external (e.g., economic conditions, competition from other industries), while others are more directly under the control of employers and other stakeholder groups. The major human resource issues facing the Canadian accommodation industry—as identified by industry representatives—are:

- **The need to establish better human resource practices** in an attempt to reduce turnover and enhance the profile of the industry as a viable career alternative. A wide disparity exists between some Canadian accommodation providers who believe in the value of sound human resource practices (e.g., training) and others who view labour purely as an expense. The short-term implication is that the industry's image—in the minds of potential new entrants—will vary considerably across the country.

The financial implications of enhanced human resource practices, at the enterprise level, must be demonstrated. Further, Canada's competitive position within the global tourism industry depends, in part, on the ability of the accommodation industry to provide a level of customer service in keeping with the expectations of international travellers.

- **The quantity and type of education and training is not necessarily tied to the needs of the industry.**

The number of positions for which employers claim post-secondary education is required is relatively small (i.e., about 30% of total positions) and modest growth in these positions is forecast. However, the program offering at the community college and university level is relatively high—as is the interest in enrollment. However, shortages in key industry positions are a perennial problem (e.g., chefs).

On-the-job training is preferred over off-site training by employers and employees. The suitability of some formal hospitality programs and the practical hands-on experience of instructors is questioned by

both students and potential employers. However, opportunities for work experience are not sufficiently advanced—except in rare cases—so that most students graduating from post-secondary programs have only received an exposure to the industry, rather than the practical hands-on experience, that is necessary for a smooth transition to the workplace.

- **A positive, service-oriented attitude remains a key criterion in the hiring decision.** Although technical competence in certain areas (e.g., food preparation) remains a concern, a positive service-oriented attitude is often viewed as a "must have" criterion at point of hire. Professional development and skills enhancement are viewed as necessary—or at least advantageous—for promotion. Many employers also tend to place a very high emphasis on hiring "fully trained" staff; that is, with prior work experience at another establishment.

- **The traditional career path is changing.** In addition to the large number of owner-operated businesses in the Canadian accommodation industry—which often results in family members holding most management positions—the organizational hierarchy in hotel chains and large independent hotels is changing. Middle management positions are being reduced and areas of responsibility broadened.

- **Part-time employment is an ongoing reality.** Some seventy per cent of accommodation industry employees work part-time as a result of personal choice or circumstance. Part-time and seasonal workers fill an employer need by meeting demand peaks and alleviating the need for full-time workers to take on an onerous work load. For the 30% of part-time accommodation industry workers who would prefer to find full-time work, creative approaches to increasing the work week—or work day—should be considered (e.g., reformatting the job classification to include additional, complementary tasks).

- **Continued co-ordination of human resource strategies and initiatives is required.** The industry is represented by a diverse number of organizations at the national and regional levels. The Canadian Tourism Human Resource Council and its provincial/territorial counterparts are charged with the responsibility of co-ordinating human resource development and training initiatives and ensuring the efficient roll-out of a national system of occupational

standards and certification. As a founding member of the Council, and one of eight national industry associations on its Board of Directors, the Hotel Association of Canada takes a lead role for the accommodation industry in creating and promoting programs directed to that industry.

- **Cultural, gender and language issues characterize the Canadian accommodation industry.**

Twenty percent of accommodation workers had neither English nor French as their mother tongue compared with 15% of the total Canadian workforce; women comprise a majority of the workforce.

Recent changes in federal government immigration policies that impact the profile of allowable immigrants may create some difficulties in filling certain positions. At the same time as dealing with the characteristics of the labour force, the number of international travellers to Canada are increasing and becoming increasingly diverse. Sensitivity to cultural differences will become more of an issue in the future.

- **While labour's primary mandate is to represent union members interests, labour organizations will come under some pressure to consider new approaches to human resource management and development.** Approaches such as self-directed work teams and multi-skilling, for example, are seen as an opportunity to improve employee job satisfaction while enhancing customer service and improving operating efficiencies. Some labour organizations will likely be more receptive than others to changing job roles.

- **Technology is seen as supportive to human resource needs rather than a threat.** The service orientation of the industry—and an increasing trend towards a greater customer-service focus—is thought to mitigate against significant job loss and other potentially negative impacts as a result of technological change. Technology is seen as a tool both to assist employees in carrying out job functions and as a vehicle for training and professional development.

The impact of these issues on the future human resource needs of the industry will require monitoring and constant evaluation, particularly in light of the recommendations offered by the Steering Committee, detailed in Chapter VI.

V CASE STUDY ANALYSIS

The analysis undertaken for this study included the review of literature and secondary data that address various human resource issues, the approaches to dealing with these issues and, if

known, the eventual outcomes. Several case studies were reviewed along with various research reports covering human resource approaches and issues in different locations around the world.

Six case studies of Canadian accommodation businesses were conducted to permit first-hand investigation of the human resource challenges facing the industry and to profile specific human resource practices. Further, a case study of the Australian accommodation industry was undertaken to identify human resource development, education, training and related trends for the purposes of comparison to the Canadian situation.

This section contains highlights from this research. Detailed summaries of the Canadian and Australian case studies are contained in Appendix C, together with excerpts from studies identified through the literature search.

A. LITERATURE SEARCH

The literature search uncovered a number of ongoing and proposed accommodation and/or tourism industry human resource initiatives in various international destinations. Five initiatives are summarized below.

1. The need for human resource investment

Much work has been done on quantifying the return on training investment and the cost of turnover in many industries, including accommodation. Unfortunately, the accommodation industry does not lend itself to easily measuring the return on training or cost of turnover. Thus, despite a few situations to the contrary, the data from various studies has not been able to be used to justify greater, or more efficient, expenditures at the enterprise level. The difficulty has been addressing the concerns of owners/operators. That is, to link the benefits of human resource investment to short-term improvements in bottom-line financial results.

A 1994 study by the Manchester Metropolitan University examined the impact on the hospitality industry of a national program in the United Kingdom entitled *Investors in People*. The study examined various hotels in the U.K. to determine the impact of achieving the *Investors in People* designation. Some of the study's specific findings are detailed in Exhibit V-1:

Generally, the return on the investment in employee training and development has been measured in several ways in the United Kingdom, including:

- Operating results—typically measured by revenue (e.g., better service results in an increased occupancy or higher average rates) or gross profit (e.g., the results of higher revenue and/or reduced operating expenses due to more efficient staff). To the extent possible employee productivity has been used, although no definitive measures exist.
- Guest satisfaction—measured in a variety of manners including: guest comment cards; guest surveys; percentage of repeat business; mystery shoppers; or number of guest complaints.
- Human resource costs—generally recruitment, training costs, absenteeism, and/or sickness costs.
- Employee satisfaction—based on relations between management, employees, and unions; employee survey; or employee turnover.
- Service standards or product quality levels.

The *Investors in People* program is guided by the following four principles that form a continuously evolving cycle:

- Setting goals—identify the vision for the future (including business goals and targets), make a commitment to training and development, and clearly communicate to employees the vision and commitment to training and development.
- Defining employee skills required—identify development needs for each employee and set targets and objectives.
- Implementing development programs—



- Implementing development programs—determine and introduce actions to develop skills in new and existing employees.
- Measuring success—Assess success of development programs against business goals and identify achievements. Begin cycle again (i.e., set goals).

Organizations in all industries are eligible to compete for this standard of excellence. Companies that meet the criteria—based on 24 assessment indicators—are given the "National Standard for Effective Investment in People." This designation is nationally recognized and can be used in all company letterhead and marketing material.

Since the program's introduction in late 1990, 1,000 companies have been accredited by *Investors in People*—including 30 organizations in the hotel, catering and tourism industries. An additional 8,500 companies are in the process of being accredited—the accreditation process lasts, on average, one year. The target is to have 50% of medium to larger companies (i.e., over 200 employees) be *Investors in People* by 1996.

Recipients of the award report improved financial results primarily due to improved human resource indicators (e.g., reduced absenteeism and turnover, higher employee initiative, and improved guest service).

Exhibit V-1

Positive impact of achieving the *Investors in People* designation

Hotel	Positive Impact
Butlins Southcoast World - (1,300 employees in peak season)	<ul style="list-style-type: none"> • 45% reduction in recruitment and training costs. • 66% reduction in staff turnover. • 72% reduction in customer complaints (staff related).
Torquay Leisure Hotels (4 hotels, over 400 bedrooms and apartments)	<ul style="list-style-type: none"> • 25% increase in gross profit (from 1990-1992). • 60% reduction in recruitment costs. • 98% customer satisfaction; high level of repeat business.
De Vere Hotels (2,700 employees, 25 4- and 5-star hotels)	<ul style="list-style-type: none"> • 12.6% increase in average room occupancy. • 15.2% increase in gross profit in 1993.
Holiday Inn Crowne Plaza and Midland Hotel—Manchester	<ul style="list-style-type: none"> • 14% reduction (49% to 35%) in staff turnover. • 30% decrease in absenteeism and sickness. • 9% increase (85% to 94%) in guest satisfaction—(i.e.) rating service as above satisfactory. • Increase in room sales. • 6% increase in employee productivity.

Source: Manchester Metropolitan University. *Who Can Afford Not To Invest In Their People: An assessment of the national standard for effective training and development, Investors in People, its impact on the Hotel, Catering and Tourism Industry, and Relevance for the Asia-Pacific Tourism Industry. 1994. Presented at the 1994 PATA Conference by Rita Ralston.*

2. Asia-Pacific initiatives

Two major human resources studies have been done in the Asia-Pacific region. Many of the issues identified, and recommendations proposed, have applications to the hospitality industry world-wide.

In 1993, the World Travel & Tourism Council and American Express Foundation funded a study¹⁴ that examined the human resource challenges existing in Asia-Pacific—the study is entitled "Gearing up for Growth—A Study of Education and Training for Careers in Asia-Pacific Travel & Tourism." The study identified a series of major human resource challenges for the industry in the Asia-Pacific region, including:

- Poor educational programs—including the lack of consistency (i.e., standards) between institutions, the emphasis on management training, and the gap between theoretical learning and practical requirements.
- Labour shortages—particularly of managerial and skilled workers.
- Poor image—belief that industry offers employees limited opportunities for recognition, advancement and reward.
- No emphasis on human resource development at small properties—for example, unable to dedicate staff to human resources.

Based on these findings, the study proposed a series of recommendations—many of which are applicable to Canada. The implementation and execution of these recommendations are to be the responsibility of a central tourism organization or of a central education authority. The study's principal recommendations include:

- Improve the public awareness of career options and opportunities in the travel and tourism industry with special emphasis on school-based career education programs.
- Establish competency-based performance standards for selected occupational preparation programs in the travel and tourism industries.

- Establish travel and tourism education councils in each country to research, identify and prioritize strategies for tourism education improvement. Councils would consist of representatives from education, industry and organized labour.
- Increase employers' human resource staffing and budget to reflect greater attention to human resource development activities.
- Improve the industry's level of input in the design of effective education systems.
- Ensure that corporate training funds are proportionately distributed among occupational categories—avoiding an emphasis on management and supervisory levels.

In the following year (1994), the Pacific-Asia Travel Association and American Express Foundation funded another study that examined the human resource issues confronting small and medium-sized firms in the region. The study¹⁵ is entitled "Gearing up for Growth II—A Study of Human Resources Issues in Small to Medium-sized Enterprises in Asia-Pacific Travel & Tourism". The study was undertaken to address the number of small—in terms of number of employees—businesses in the travel and tourism industries. Small firms were defined as having between 1 and 99 employees, while large firms have between 100 and 750 employees.

The study found strong similarities in the human resource needs and concerns among firms of all sizes—large and medium/small. Both sub-groups of employers reported that qualified workers (especially qualified managerial and professional workers): are difficult to recruit; do not feel that the region's education programs are adequate; and believe that government should do more to increase the number and quality of these programs. The major differences between the two sub-groups are the in-house strategies for addressing these human resource problems and the overall vision of government's role. Some of these differences were thought to be due to regional factors as opposed to the size of the firm.

¹⁴The study was completed by the Center for Tourism Policy Studies, School of Travel Industry Management, University of Hawaii at Manoa.

¹⁵Ibid

Many of the recommendations contained in the original study were seen as being equally pertinent to small and medium-size firms. As with the previous study, the recommendations are to be the responsibility of a national tourism organization or a national education authority. Many of the study's recommendations are of interest to the Canadian situation, including:

- Increasing the input of small and medium-sized firms in the development of the national tourism organization's human resource development strategies.
- Assessing the educational and training programs to ensure that the theoretical learning can be used in the workplace. Of concern, particularly in developing nations, were employees' weak levels of initiative and problem-solving skills.
- Providing technical assistance to small and medium-sized firms in developing effective in-house training programs.
- Broadening the scope of human resource development beyond skills training, to include other key components such as career planning, job enrichment and redesign, and worker participation.
- Examining opportunities for cost-sharing of training programs being provided by third parties (e.g., educational institutions, consultants).
- Increasing emphasis on cultural diversity training—particularly language skills.

Many similarities exist between the findings in the Asia-Pacific region and Canada, providing some assurance that the global industry faces many of the same challenges despite geographic boundaries.

3. Identifying occupation standards and implementing a national certification program

The United States government is proposing to identify and validate voluntary skills standards for all occupations. These national standards will be integral in future job training programs for displaced workers, educational funding for at-risk populations and vocational education programs.

The Council on Hotel, Restaurant and Institutional Education (CHRIE) is working under a co-operative arrangement with the United States Department of Labour to develop an approach for developing occupation standards for the hospitality and tourism industry and certifying employees that meet those standards. Also involved in the development of these standards are the Educational Institute of the American Hotel and Motel Association and the Educational Foundation of the National Restaurant Association.

Australia has introduced National Competency Standards for the tourism and hospitality industry. By the end of 1994, standards had been developed for twelve industry areas, including: guest services (e.g., front office, housekeeping), food and beverage, and hospitality management. Among the various benefits of having introduced these standards is the greater co-operation between educators and employers and the improved industry profile.

Canada, through the Canadian Tourism Human Resources Council and provincial tourism education councils, is quite far along in this regard. Appendix D summarizes the status of occupational standards in Canada.

4. Accrediting hospitality programs

In response to an industry concern of the number and quality of hospitality programs introduced at various educational institutions, the CHRIE began offering an accreditation program for hospitality programs. The accreditation of Baccalaureate programs (i.e., 4-year program) was introduced in the summer of 1992; the accreditation of associate programs (i.e., 2-year program, usually more hands-on/trade oriented) was in its first year in 1994.

The process for accreditation begins with representative(s) of the program completing a self-study guide and submitting the guide to CHRIE. The guide is used to determine whether the program meets the accreditation standards in seven areas, including: mission/objective, faculty/instructional staff (e.g., faculty qualifications, staff/student ratios), student services/activities (e.g., graduation requirements, placement services), and curriculum. The most stringent requirements are in the area of curriculum—the program's course/information

content must provide students with an acceptable level of hospitality training. CHRIE offers a workshop to applicants on how to complete the self-study guide and recommends that applicants take one year to complete the guide.

The completed guide is returned to CHRIE and is evaluated by a team of evaluators. The evaluation focuses on what the program is doing to meet the standards, as opposed to whether the program already meets the standards. Following the evaluation, the evaluators conduct a site inspection. Based on their evaluation of the guide and site inspection, the evaluators prepare a report for the Commission. The Commission meets biannually and determines whether the program should be accredited.

The fees for having a program accredited are \$500 (for the application and evaluation of the self-study guide) and incidental expenses incurred by evaluators during their site-inspection.

Currently, there are 32 accredited Baccalaureate programs (17 are in the process of being accredited) and 50 Associate programs that are in the process of being accredited (including 3 Canadian programs). All the accredited Baccalaureate programs are in the United States.

5. Implementing language proficiency standards

The Indonesian government has undertaken an aggressive program (i.e., "Visit Indonesia Decade") to promote the country's tourism industry. The Government anticipates that by 1999 there will be 6.5 million visitors annually to Indonesia—an increase of 67% from the current number of visitors. To achieve this growth rate, the quality of services provided to visitors was seen as needing improvement. Consequently, the government has placed an increased emphasis on human resource development. This resulted in the formation of the National Council for Tourism Education and Training in 1988.

One of the Council's objectives was to develop English proficiency standards for certification in the hotel and tourism industry—English was seen as the language spoken by the greatest number of

international travellers. The decision was made to use an existing English language test (Test of English for International Communication—TOEIC—developed by the Educational Testing Service in the United States) that is used internationally to measure a non-native's English proficiency in daily working conditions. Pilot studies using the language testing program were conducted between 1989 and 1994.

Five levels of standards were developed for each position in over ten departments of the tourism sector—these departments have the highest amount of guest interaction. These standards will initially be introduced in hotel and tourism schools to ensure that graduates enter the workforce with adequate English language skills. These language proficiency standards will become one of the requirements for hotel licensing—hotels will have a two-year grace period to ensure that all their staff meet the language proficiency standards.

B. CANADIAN CASE STUDIES

The six Canadian case studies conducted during the course of this study were selected to provide some perspective on current human resource practices. The case studies included both urban and non-urban, and chain and independent properties.

Some of the human resource practices identified were still at the discussion stage while others had been implemented for some time. The Steering Committee expressed some skepticism regarding the "newness" and long-term application of these practices. The discussion below highlights two such practices—self-directed work teams and multi-skilling—as well as a description of outsourcing.

1. Self-directed work teams

As the name suggests, self-directed work teams are an approach to eliminating the manager-staff relationship in favour of a team-oriented approach. In those situations where self-directed work teams were in place, such typical "management" decisions as shift allocation, pay increases, discipline and product ordering were now being left to the team.

Departments where self-directed work teams have been implemented include food and beverage, housekeeping, fitness facilities and other distinct operating departments within the hotel. While

periodic monitoring—primarily at a bottom-line performance level—is provided by senior hotel management, the work team is generally left to its own devices.

At least two major Canadian hotel chains are currently experimenting with this human resource management approach. Several independent properties have also instituted similar practices. As with the hotel investigated during the case study, the other chain and independent hotels embarking on this approach have also focused on housekeeping and the food and beverage area.

Feedback from employees is generally positive. As to measurable benefits, rates of staff turnover have generally been lower within these departments. In certain cases profitability has increased substantially.

2. Multi-skilling

The objective behind multi-skilling is to train employees across a range of job functions. For example, a "guest-services agent" might be responsible for functions such as bell desk, doorman, front desk agent and concierge. The primary benefits of multi-skilling include the potential to increase the number of full-time workers, and the creation of greater levels of diversity in the job function so as to increase the desirability of the position(s) to the employee. Multi-skilling also provides a greater degree of flexibility to the employer and, in some cases, may have a modest impact on labour cost.

Multi-skilling should not be confused with job-sharing. The latter is normally focused on reducing the number of employee hours at a given workplace by having multiple employees share responsibility for a single job function.

3. Outsourcing

Outsourcing entails the transfer of responsibility for a given department(s) to an independent outside operator. The trend towards outsourcing of various functions is most pronounced in the food and beverage and some support (e.g., laundry) areas. Examples of food and beverage outsourcing at Canadian hotels are plentiful. In addition to the Elephant & Castle operation at Winnipeg's Crowne Plaza, the Grand Yatt Dynasty operates in the Westin

Harbour Castle (Toronto) and Zen restaurant in The Westin Mont-Royal (Montreal). Ruth's Chris Steak House opened in Toronto's Hilton Hotel in the summer of 1995, replacing Trader Vic's.

The rationale for outsourcing varies by situation. However, in the case of food and beverage operations, the justifications for outsourcing include the ability to acquire a highly-recognized restaurant "brand name" as a means to generate increased revenue and the ability for the hotelier to transfer operating responsibility of food and beverage operations to an organization or individual potentially better skilled in food and beverage management. While outsourcing has been proven to work in many hotel circumstances in Canada and the United States, some concerns remain. From a customer's point-of-view, identity of the two now independent operations is a concern in such areas as signage, staff uniforms, billing practices and the like. The most significant potential impacts from a human resource management perspective are integration of the restaurant employees with accommodation facility employees, discipline, compensation and motivation.

C. AUSTRALIA

The Steering Committee directed an investigation of the Australian accommodation and hospitality industry as related to human resource issues, due to a belief that Australia was advanced in the structuring of an approach to human resource development. As in Canada, various industry bodies represent the hospitality and tourism industry on a variety of issues. However, the existence of Tourism Training Australia (TTA)—the trading name for the National Tourism Industry Training Committee—provides much more focus in the human resource area than currently exists in Canada.

TTA has been in existence since the mid 1980's and is the central body for seven state or territorial committees focused on the training needs of the industry. TTA is recognized by the National Training Board as the Competency Standard Body for the tourism and hospitality industry.

TTA administers three programs: "Australian Hospitality Review Panel (AHRP)," which grants recognition to educational programs achieving

industry standards, the "Australian Tourism Training Review Panel" which is similar to the AHRP but more broadly focused on tourism, and "ACCESS", a system for recognizing workplace skills.

Despite the more formal, and longer-standing structure surrounding TTA and related human resource development initiatives, many concerns of educators, employers and industry associations in Australia were similar to those raised in Canada. For example:

- The image of the industry is one of a transitory workplace with questionable recognition of career worth.
- Attitude is a key hiring criteria.
- Communication is lacking between and among the various organizations speaking for the industry.
- Fragmentation of the educational community despite TTA's strong mandate and far fewer educational institutions than in Canada.
- Over-subscription to hospitality programs, yet shortages in key occupations (e.g., chef).
- Financial constraints from the recent recession resulting in staff reductions at the management level.
- A belief that the service mentality needs to be strengthened, together with a focus on language skills and broader general management capabilities at the middle and senior manager levels.

An industry commission inquiry is currently underway in Australia focused on the broader training arrangements within the tourism industry. A tentative completion date is set for February 1996. Submissions are currently being sought from interested parties based on an issues paper circulated in March, 1995. The objective of the inquiry is to examine the relationship between those bodies charged with the responsibility of providing training and to understand how training is delivered to private-sector organizations.

VI RECOMMENDATIONS

A. OVERVIEW

Possibly the most significant underlying challenges facing the accommodation industry are the tendency towards short-sightedness and of reacting to issues

rather than taking a proactive, longer-term strategic approach. While numerous exceptions exist—company by company and/or issue by issue—employers are typically more focused on those short-term tactics and strategies that have an immediate, clearly demonstrable impact on bottom-line operating results. As with employers, most other accommodation industry stakeholder groups—with noted exceptions—are also short-term focused. Academic institutions concentrate on this and next year's enrollment. Labour organizations are concerned with the next round of contract negotiation. And a large proportion of employees view the industry as a short-term opportunity to earn income while enroute to another career.

In order for this situation to change, an environment needs to be fostered where longer-term human resource strategies are rewarded; and where these rewards are communicated widely to all types of accommodation businesses. Funding of training and other human resource development programs should be tied to a long-term strategy. Results should be measurable.

The significance given to sound human resource development practices needs to be increased.

One of the most notable findings of the interview process was the disparity among employers with regard to the emphasis given to sound human resource development practices. At one end of the spectrum sound human resource practices are seen to be essential components of a successful operation. At the other end, human resource development initiatives (e.g., training) are viewed purely as an out-of-pocket expense with little or no perceived payback. Whether a national chain or an owner/operated business, chain affiliated or independent, rooms only or full-service, small or large operation, the disparity seems to cross all regions.

In an industry focused on customer service, this disparity should be viewed as a great concern.

More communication and stronger linkages among stakeholder groups is an essential element to increasing the prominence of human resources as a key component of success in the accommodation industry. Demonstrating the financial implications of sound human resource development practices will also serve to raise this level of awareness. Employers must be shown how more effective human resource practices can improve bottom-line operating results. Recommendation 1 addresses the need for such steps in more detail.

Employers will need to recognize that they need to play a prominent role in developing a professional approach to human resource management practices. Employers should be aggressive in setting the agenda, rather than waiting for assistance from external program developers. In an environment that increasingly emphasizes customer service, the value of well-trained, properly-motivated and sufficiently compensated employees is a key competitive advantage for the accommodation industry—individually and collectively—and the Canadian tourism industry generally. Employers should raise the profile given to human resource issues by directing accommodation industry associations at the municipal, provincial and national levels to treat human resource needs with equal priority as marketing and regulatory matters.

Similarly, the Hotel Association of Canada and provincial accommodation associations should seek to enhance the profile given to human resource issues when setting priorities. While the accommodation industry faces numerous marketing, financial and regulatory concerns, the various Canadian hotel associations have an obligation to advance human resource issues among their members as well.

The Canadian Tourism Human Resource Council, together with national industry associations represented on the Council, should be responsible for co-ordinating human resource development and training initiatives within the industry. For the



accommodation industry, the Council and the Hotel Association of Canada are the most important linkages between employers, labour, educators and government.

Labour organizations should continue to co-operate with their members and employers in the consideration of new approaches to human resource management and development. Issues of particular concern are those part-time workers looking for full-time employment (i.e., approximately one-third of workers), reducing the rate of turnover, and compensation issues. Flexibility to implement such new approaches as self-directed work teams, multi-skilling and other emerging management initiatives should be considered.

Government support of human resource development initiatives in the accommodation industry should be continued. The role for government is one of facilitator, leverager and catalyst. As the Canadian Tourism Commission and other agencies charged with the responsibility of improving Canada's international competitiveness gain momentum, human resource issues should be placed front and centre on the agenda. Additionally, given the impact of financial constraints on many accommodation industry employers, government should consider innovative approaches to provide financial assistance (e.g., training allowances) to support the initiatives contained in this study.

B. DETAILED RECOMMENDATIONS

The following recommendations were developed under the direction of the Steering Committee and are based on the findings and conclusions presented throughout this report. Most of the recommendations are inter-related. Many are based on a few broad, industry-wide concerns and issues. The Steering Committee endorses the following recommendations. Further, the Steering Committee encourages the accommodation industry to proactively begin implementation immediately.

In many of the earlier human resource sectoral studies in other industries, often the lead-off recommendation has been the creation of a human resource council. The purpose of such a council is to co-ordinate human resource development, training, certification and related initiatives. The Canadian

Tourism Human Resource Council (Council)—which was formed in 1993 to represent all tourism sub-sectors—has just such a mandate. Together with the Hotel Association of Canada—a founding member of the Council—the accommodation sector is well served with vehicles for the co-ordination and facilitation of industry initiatives. **However, the effective implementation of the following recommendations will only be achieved if all stakeholder groups—including employers, employees, educators, labour organizations, government and the various national and provincial industry associations and education councils—become actively involved.**

The recommendations discussed below identify the roles and responsibilities of various stakeholder groups as a means to facilitate implementation. The Steering Committee believes the recommendations should be viewed with equal attention; therefore, numbering of the recommendations should not be construed as prioritization.

RECOMMENDATION 1—Illustrate the financial impacts from good human resource practices.

Labour is not only the single largest controllable expense in the accommodation industry but also a key component in the success and profitability at the property level. In addition to direct payroll costs, the total investment in labour (i.e., wages and salaries in addition to training and related expenditures) has an impact on profitability in the form of increased occupancy and average room rate generated by satisfied, return customers. Given the bottom-line orientation of the industry, the positive financial impacts of improved human resource practices must be demonstrated to accommodation facility managers and owners. At a minimum, some urgency is recommended in developing “best practice” tools that will demonstrate the potential return on investments in training and the cost of turnover.

Some information already exists and several major academic studies have been completed in this area. Therefore, duplication of such data or an attempt to create a Canadianized version is not recommended. Instead, the Steering Committee wishes to focus on the development and communication of a small number of defensible “best practices” or testimonials using known Canadian accommodation businesses

of various sizes and in various locations. Managers and/or proprietors of these best practice case studies would be encouraged to communicate the tangible results of such approaches through their provincial accommodation associations and education councils. The industry is more likely to place greater stock in a testimonial from their peers than a purely academic study.

ACTIONS:

- The Canadian Tourism Human Resource Council should identify a framework for developing a best practices analysis of training investment and the cost of turnover.
- The Hotel Association of Canada and its provincial counterparts will identify employers willing to provide data and act as test locations for further analysis and evaluation.
- The educational community is encouraged to place more emphasis on case study development that focuses on labour economics either in conjunction with this initiative or through ongoing research and development.
- The research community—including government (provincial and federal), the Canadian Tourism Commission, research organizations such as the Canadian Tourism Research Institute and the Travel and Tourism Research Association and educational institutions—must include labour market issues as part of the tourism research agenda.
- The Council and the Hotel Association of Canada will jointly be responsible for promoting and distributing the findings of these best practice initiatives.

While this recommendation focuses on the direct financial implications of these best practice initiatives, employers are likely to reap intangible benefits (e.g., improved morale, increased guest satisfaction) from a heightened awareness of human resource issues.

RECOMMENDATION 2—Cultivate more effective linkages among and between industry stakeholders.

The Steering Committee believes stronger linkages between key stakeholder groups in the Canadian accommodation industry are needed—specifically, linkages between the educational community and the industry; and between employers and labour organizations. Co-ordination, co-operation and communication should be constant themes in an industry with a diverse number of interests and variety of business establishments.

ACTIONS:

- The Canadian Tourism Human Resource Council's mandate will include organization of an annual human resource "summit" to which representatives of all stakeholder groups would be expected to attend. The summit could be used as a forum to exchange ideas, relate success stories and identify areas of concern. Funding support from HRDC will likely be required to initiate the process.
- The Canadian Tourism Human Resource Council and the Hotel Association of Canada will continue to work towards a common vision for human resource development goals and objectives in the accommodation industry.
- Provincial education councils and accommodation associations, educational institutions, employers and labour organizations are encouraged to forge closer alliances within their provinces/territories.
- The Council will be responsible for facilitating an exchange of information between employers and labour organizations on human resource development/management practices (e.g., maintaining a resource centre, electronic information exchange).

These actions will require the active participation of all stakeholder groups.

RECOMMENDATION 3—Launch a national career opportunities awareness program.

The misperceptions about potential career opportunities within the industry are substantial—a result, in part, of a lack of information. More information regarding the nature and breadth of job classifications, career advancement, attributes of the industry and the ideal employee profile should be better communicated—particularly as 30% of the jobs in the industry are in occupations where employers feel a college or university education is desirable.

Continue to adapt, refine and make available career information kits.

These kits—building on existing materials already developed in some jurisdictions—would include comprehensive materials for distribution to high schools (e.g., career and guidance counsellors, librarians). The kits will focus on describing job opportunities, possible career paths, compensation levels, skill requirements and candidate attributes for industry occupations requiring a minimum of high school education. The goal should be to involve career influencers (e.g., high school career counsellors) in career fairs and related career awareness programs, ideally building on increased student interest in the industry.

ACTIONS:

- The Canadian Tourism Human Resource Council should ensure all existing materials prepared at the provincial level are catalogued for use by other provincial education councils and accommodation associations.
- The provincial tourism education councils should continually identify the information needs of school boards (i.e., high school, technical schools) in their provinces.

All distribution methods for dissemination of career information should be considered including the placement of materials (e.g., hard copy, CDs) in high school libraries and resource centres, enlisting industry spokespersons to visit local schools to discuss industry opportunities and creating opportunities for students to visit hotels to see first-hand what the industry offers.

Stage career fairs—directed at the high school, college and technical school levels similar to the successful events regularly produced by the Pacific Rim Institute of Tourism in B.C. and the Tourism Industry Association of Nova Scotia. Employers, educators and labour organizations need to actively participate in the development and staging of such career fairs.

ACTIONS:

- Provincial and municipal/regional accommodation associations are encouraged to continue working together with their respective provincial tourism education council in the development and hosting of career fairs and secondary school career awareness programs—at least on a biannual basis—in major centres across the province.
- The Council should build upon the past experiences of the Pacific Rim Institute of Tourism, Tourism Industry Association of Nova Scotia and other provincial tourism education councils as required, to develop a “how to” manual for staging such fairs and secondary school career awareness programs in those jurisdictions where such programs have not been implemented.

These forums are expected to provide an excellent opportunity to showcase the diversity of the industry to potential employees.

Involve industry “role models” in the identification of career opportunities in the industry.

General managers and other senior management at the property and head office level should actively participate in career fairs and in broader career awareness initiatives to explain the employment and career opportunities in the industry.

ACTIONS:

- The Hotel Association of Canada (for senior corporate accommodation industry executives) and provincial industry associations (for general managers and other senior property-level management) are encouraged to identify appropriate spokespersons who are willing to participate in career fairs and secondary school career awareness programs.

In addition to these initiatives, accurate compensation data is desired by career influencers. Such data would demonstrate the comparable compensation of accommodation industry positions—particularly at the middle and senior management levels.

RECOMMENDATION 4—Identify and/or create, catalogue, communicate and distribute appropriate training programs and tools.

According to employers interviewed for this study, only 30% of accommodation industry employees work in occupations where an accommodation-specific community college or university degree is required; the balance of employees require high school graduation or less. While the training approaches available to the industry vary substantially, both owner-managers of small accommodation businesses and the general managers of larger hotels, face a challenge in providing necessary skill-based training in a cost effective manner.

Development of training programs and tools must take into account the operating environment at the business level. In many cases, training an employee involves taking the individual away from his/her job responsibilities and replacing that individual with another staff member. Aside from the increase in payroll costs, logistics may prevent such staff replacement (e.g., in a small property where additional staff are not available).

ACTIONS:

- In their role of brokering training products, the national and provincial tourism education councils and accommodation associations should encourage development or adaptation of training materials that are prepared in a modularized, “how to” format.
- Dialogue between employers and community colleges regarding industry’s needs for off-site training programs (e.g., timing, suitability of course content, cost, program length) should be facilitated by provincial tourism education councils and accommodation associations.
- Recognizing industry’s desire to manage much of the skills-based training needs in-house, the Council is encouraged to continue development of “train-the trainer” programs to facilitate this approach.

The needs of small and medium-sized owner/operated businesses should be given specific attention in the development of training materials.

This type of establishment comprises the majority of Canadian accommodation businesses—as opposed to total number of rooms or employees. Many of these businesses have small management teams—sometimes one or two individuals—and relatively modest staffing levels. Skill requirements at the owner/operator level include business planning, financial management, human resource management, marketing and general management expertise. Delivery of such programs poses a challenge given the difficulty for the owner/manager to attend training sessions off-site. As a result, other delivery methods should be given some priority. In these circumstances modular training should be used and distance learning and technology applications should be given further consideration.

ACTIONS:

- The Canadian Tourism Human Resource Council should catalogue the variety of management-level, self-study programs available through the Hotel Association of Canada, provincial hotel associations, the American Hotel and Motel Association, labour organizations and other such bodies. Such information should be shared regularly.
- The Hotel Association of Canada needs to play a lead role in the dissemination of information regarding the availability of programs suitable for all types of accommodation businesses. Feedback from members regarding the approach to training and needs of the independent owner-operator should be disseminated to the Council and provincial tourism education councils.

Develop tools to assist with in-house training. The majority of both employers and employees interviewed, preferred on-site, in-house training to other methods. Although some skepticism exists about the applicability of externally-developed training material for in-house use, the Steering Committee believes that development of standard tools will increase the likelihood of use and raise the training standards across the country. The vehicle used for such training (e.g., paper, video, multi-media) should

be consistent with the needs of the end-user. While some facilities may have reached a level of sophistication suitable for multi-media tools, many others would find video or hard copy tools more useful.

ACTIONS:

- The Council should facilitate development of—or adapt from other material (e.g., Hotel Association of Canada training products, American Hotel and Motel Association training products, labour organization training modules)—training products suitable for use by employers or by employees on a self-study basis.
- The Council and the provincial tourism education councils and industry associations should work co-operatively in communicating the availability of these products.

Without the ability to place the materials in the hands of those who require it, the development of such materials will be a wasted effort. Consideration should be given to delivery mechanisms, pricing levels, format, delivery agents and other concerns. In addition, feedback on the suitability and appropriateness of course materials should be an integral component of any communication strategy.

RECOMMENDATION 5—Expand the availability of work experience for students enrolled in accommodation programs.

A recurring complaint among employers is the lack of practical experience held by graduates of hospitality programs. The opportunity to gain work experience—either in Canada or via an international program—is limited to those students enrolled in those educational institutions that have built strong linkages with employers. Even then, the number of “slots” is limited.

ACTIONS:

- Major Canadian hotel companies should be encouraged to provide additional work experience opportunities to hospitality program participants.
- The Hotel Association of Canada should continue with its international work experience initiatives. Funding support of this initiative

should be considered by HRDC as a model for future private sector investment.

- Employers and educational institutions offering work experience need—in many cases—to formalize the process by defining “practical experience” and identifying specific tasks to be completed during the work term.
- Educational institutions must match course delivery with the needs of the industry. Some existing opportunities for work experience offered at Canadian universities (e.g., University of Guelph) may be used as examples. In developing and formalizing opportunities to gain practical work experience however, care should be taken not to exclude certain types of employers (e.g., small hotels and/or inns).

RECOMMENDATION 6—Endorse the process of implementing national standards and certification.

The Canadian Tourism Human Resource Council, together with its provincial counterparts and national industry associations, has embarked on an aggressive strategy to implement occupational standards in the accommodation industry and to certify those individuals that have successfully met the standards. The Steering Committee endorses this initiative.

ACTIONS:

- The Hotel Association of Canada and provincial accommodation associations should continually provide their members’ feedback to the Canadian Tourism Human Resource Council on the appropriateness of both the standards and the certification process as they relate to the accommodation industry.

The Steering Committee also recognizes the lead role played by the Hotel Association of Canada, within the Canadian Tourism Human Resource Council, in developing, endorsing and promoting occupational standards and certification programs for the accommodation industry.

RECOMMENDATION 7—Support enrolment only in those educational and training programs that meet national occupational standards.

Notwithstanding a select few high-quality and industry-recognized post-secondary hospitality programs, the number and variety of educational and training programs directed to the accommodation and tourism industry is overwhelming. In many cases, development of these programs has been based on regional economic diversification initiatives and an attempt to retrain workers from other primary industries affected by economic restructuring. As a result, many programs have been developed that do not have a realistic link to potential job and/or career opportunities. At the same time, shortages in certain occupations (e.g., chefs and cooks) seems to be a perpetual problem in the industry.

ACTIONS:

- Federal and provincial governments are encouraged to fund only those programs that address an identified industry need—on an occupation-by-occupation basis.
- Employers need to communicate employment needs to government through their provincial tourism education councils.
- Only those programs that meet national occupational standards should receive public funding.

Supporting enrolment in those education and training programs that meet national occupational standards should improve both the course quality and delivery mechanisms of such programs.

RECOMMENDATION 8—As a longer term objective, endorse program offerings of teaching institutions that meet pre-determined criteria.

In addition to developing occupational standards and certification for accommodation industry employees, some standardization is also required among programs offered by academic institutions. At a minimum, prospective employers need to be assured that program graduates are capable of functioning in the workplace. As a result, some information on the scope and components of programs offered by educational institutions is necessary in order to

evaluate graduates as potential employees. Such information might include the level of industry immersion for instructors, participation by industry on advisory/curriculum development boards, and adherence to national occupational standards in the development of curricula.

ACTIONS:

- The Council and provincial tourism education councils, with input from employers and industry associations, should consider possible approaches to endorsing program offerings of teaching institutions as a long-term objective.
- The Council through its provincial counterparts should build on the existing inventory of programs (Appendix F) to prepare an inventory of “approved” programs that address criteria as set out in the national occupational standards.

Communicating endorsed programs to potential employers is a key initiative. Many employers expressed bewilderment regarding the suitability of graduates from the more than five hundred college and university tourism/hospitality programs across Canada. The sense of bewilderment heightened when graduates from community colleges from one region of the country seek employment in another. Little information is available to the employer regarding the suitability and applicability of accommodation programs offered by many Canadian community colleges and universities.

ACTIONS:

- The inventory of endorsed programs should be communicated to employers, labour organizations and others by the Council, the Hotel Association of Canada and the provincial counterparts of both these organizations.

At the same time consideration must be given to the number of program graduates in relation to available positions. As net employment growth—before allowance for turnover—is expected to be modest over the next ten years, the proliferation of hospitality industry programs should be looked upon with some concern.

ACTIONS:

- The Council and its provincial counterparts should continually update enrolment numbers in accredited hospitality programs for monitoring against industry needs.

Completion of these steps will serve to ensure a greater balance between supply and demand, and to ensure the supply of graduates meets the quality standards of the industry.

RECOMMENDATION 9—Recognize that students working in part-time or seasonal positions are potential long-term employees.

The accommodation industry employs a large number of students on a part-time and/or seasonal basis. In fact during 1989, some 32.5% of part-time accommodation industry employees were working part-time because they were attending school. Part-time and seasonal workers—particularly students—should be viewed as potential long-term employees in the accommodation industry, either on a continuing part-time and/or seasonal basis or, ideally, as a long-term career choice.

ACTIONS:

- Employers, labour organizations and full-time employees should seek to provide a positive work experience for students working part-time and/or seasonal shifts in the accommodation industry.

If students—and to some extent, other part-time and/or seasonal workers—are viewed simply as a source of less expensive labour, the likelihood of convincing these individuals to consider a career in the accommodation industry is greatly diminished.

Recommendation 10—Investigate methods to assist educational institutions become equipped with state-of-the-art technology.

A major teaching impediment in several educational institutions is the lack of up-to-date technology with which to train students. All too often the technology available for teaching is several years behind current technology used in industry. Continued budget restrictions make the acquisition of such technology difficult.

ACTIONS:

- The Hotel Association of Canada—supported by its large corporate members—should encourage large technology suppliers to provide hardware and software to accredited educational institutions.
- The Hotel Association of Canada should work with representatives of major technology suppliers and Department of Finance personnel to investigate possible preferential tax treatment for the provision of such technology.
- Educational institutions will need to ensure teaching staff have the opportunity to learn the benefits and attributes of new hardware and software.

Maintaining accredited teaching facilities at current levels of technology adoption should be viewed as an essential step in providing knowledgeable, job-ready graduates.

C. CONCLUSION

The active participation of all stakeholder groups in the Canadian accommodation industry will be required to ensure the long-term success in furthering human resource development initiatives. Moving the industry from a short-term orientation to a longer-term, strategic view will take time. However, the Steering Committee recommends the quick acceptance of these initiatives as a first step in this evolution.

APPENDICES

	Page
APPENDIX A	
Members of the Steering Committee	A-3
APPENDIX B	
List of Interview, Focus Group, and Case Study Participants	A-7
APPENDIX C	
Case Study Summaries	A-11
APPENDIX D	
Current Status of Occupational Standards and Certification in Canada	A-31
APPENDIX E	
Additional Labour Force Data and Tables	A-33
APPENDIX F	
Listing of Accommodation and Tourism Programs at Canadian Educational and Training Institutions	A-39
APPENDIX G	
Hotel Associations - National, Provincial, Territorial	A-57
APPENDIX H	
Tourism Education Councils - National, Provincial, Territorial	A-59
APPENDIX I	
Study Team	A-61
GLOSSARY	A-62
BIBLIOGRAPHY	A-63

APPENDIX A

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APPENDIX B

LIST OF INTERVIEW, FOCUS GROUP AND CASE STUDY PARTICIPANTS

1. Hotel Chains-Human Resource Professionals

Commonwealth Hospitality (Toronto)
Canadian Pacific Hotels & Resorts (Toronto)
Holiday Inns of Canada Ltd. (Toronto)
Marriott Corporation (Washington, D.C.)
Travelodge/Royco Hotels & Resorts Ltd. (Calgary)
ITT Sheraton (Toronto)

John Platts
Bonnie Holbrook
Mary Cox
Steve O'Connor
Sue Wadland
Trudy Bower

2. Independent Owners/Managers

Hotel Normandin (Quebec City)
Hotel Chateau Versailles (Montreal)
Manoir St. Sauveur (St. Sauveur, P.Q.)
Fredericton Inn (Fredericton)
Lord Beaverbrook Hotel (Fredericton)
Inn on the Hill (Charlottetown)
Best Western MacLaughlan's Motor Inn (Charlottetown)
Russell Inn (Russell)
Regina Inn (Regina)
Denham Inn (Leduc, Alberta)

Jean-Pierre Brie
Germain Villeneuve
Diane Pacquet
John Waite
Frederic Fettah
Roger Beven
Jim Clements
Daymon Guillas
Maynard Vollin
Dave Kaiser

3. Industry Associations

Alberta Hotel Association (Edmonton)
Hotel Association of Canada (Ottawa)
Hotel Association of Metro Halifax
Hotel Association of Metro Toronto
B.C. & Yukon Hotels and Association (Vancouver)
Ontario Tourism Education Council (Toronto)
Pacific Rim Institute of Tourism (Vancouver)
L'Association des Hoteliers de la Prov. de Québec (Montreal)
Northwest Tourism Training Group (Yellowknife)
Hostelling International Canada

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Tony Pollard
Nicholas Carson
Rod Seiling
Jim Chase
Susan Dowler
Terry Hood
André P. Jean-Richard
Hilary Jones
Michael Tarnowski

4. Labour Organizations

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Canadian Auto Workers (Vancouver)
Hotel, Restaurant & Culinary Employees &
Bartenders Union (Vancouver)
TCA Québec (Montreal)
United Food & Commercial Workers International
Union (Toronto)
Fédération du commerce inc. (Montreal)

Dick Gingerich
Silvia Simpson

Nick Worhaug
René Moreau
Walter Lumsden
Stan Urbain
Jean Lortie

5. Technology Suppliers

Electronic Technology

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Northern Telecom
Sulcus Hospitality Group
Encore
Hotel Information Systems

John Blackham
Ingrid Bergen
Elizabeth Durling
Michael Squires
Robert Sanford
Wendy Colby

Food Technology

Nestlé's Canada Inc.
Marsan Foods
Ecolab

Perry Miele
James Jewett
Rob Sloan

6. Technology Users

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Four Seasons and Regent Hotels & Resorts (Toronto)
Holiday Inn Worldwide (Toronto)

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Vic Wozniak
Michael Hwu
Adrian Trumper

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Mount St. Vincent University (Halifax)
Vancouver Community College
Ryerson Polytechnic University (Toronto)
Southern Alberta Institute of Technology (Calgary)
University of Guelph
Educational Institute (AH&MA)
Sheraton Centre/ITHQ (Montreal)
Red River Community College (Winnipeg)
Association of Canadian Colleges—Business
Holland College
Canadore College of Applied Arts & Technology
Trent College

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Pierre Brodeur
Don Shiner
Dave Donaldson
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Margaret Walsh
Michael Haywood
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Michel Giguère
David Pew
David Williamson
James Coll
Neil Cornthwaite
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8. High School Career Counsellors

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Coal Harbour High School (Dartmouth)
Nova Scotia Board of Education (Halifax)
Adult Day School-York (Toronto)
ISM-Career Ware (Choices)
Alberta Department of Education (Edmonton)
L'Ecole Lavoie (Montreal)

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Mike Whitehouse
Dr. Barry Fox
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Christina Roldan

9. Hospitality Program Students

Algonquin College (Ottawa)	6 Students
University of Guelph	5 Students
Constellation College (Toronto)	11 Students
Vancouver Community College	6 Students
TIPS College (Vancouver)	5 Students
Institut de tourisme et d'hôtellerie du Québec (Montreal)	9 Students
École Hôtelière des Laurentides	6 Students
Nova Scotia Community College	8 Students
Mount St. Vincent (Halifax)	15 Students

10. Employees

Hotel Vancouver (Union)	3 Employees
Denham Inn (Non-union)—Leduc, Alberta	2 Employees
Royal York (Union)	3 Employees
Lord Beaverbrook (Non-union)—Halifax	1 Employee
Fredericton Inn (Non-union)	1 Employee
Inn on the Hill (Non-Union)—Charlottetown	3 Employees
Manoir St. Sauveur (Union)	2 Employees
Holiday Inn (Non-union)-Kitchener	3 Employees
Holiday Inn Yorkdale (Union)—Toronto	3 Employees
Halifax Focus Group	Sheraton: 2 Employees
	Prince George: 2 Employees
Vancouver Focus Group	Sutton Place: 1 Employee
	Delta Place: 2 Employees

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Tourism New South Wales	Elizabeth Allen
University of New South Wales	Michael Simons
Griffith University	Bill Faulkner
Tourism Council of Australia	Chris Cook
Southern Pacific Hotels	Stephen Holle

12. Canadian Accommodation Case Studies

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Owner/operator	Julie Bélanger (spouse)
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Comptroller	Cecile Laflamme
Executive Chef	Gilles Dubois
2nd Cook, Pastry Chef	Marcel Letourneau
Head of Front Office	Guylaine Turgion
Waitress	Jocelyne Gilbert

Crowne Plaza Winnipeg Downtown

General Manager
Human Resources Director
Executive Housekeeper
Outlets Manager
Kitchen Manager
Manager-Revenue & Guest Services
Food and Beverage employees

Alan Phillips
Kim Wong
Cheryl Cyr
Angela Martin
Brad Gray
Terry Reutlinger
Martine Tollenaar
Sanny Lam
Alan Semchuk
Trudy Martyniw
Lydia Catena
Johanne Lacroix
Joe Loureiro
Debbie Anderson
Kerry Wasmuth
Edward Lehmann

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Hotel Macdonald (Edmonton)

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Director, Human Resources
Guest Service Manager
Reservations Manager
Director, Food and Beverage
Executive Housekeeper
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Indu Brar
Jackie Carruthers
David Moffat
Irma Inostroza
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Guest Services staff

Holiday Inn Toronto Yorkdale (Toronto)

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Sylvia Croccione

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Sheraton Cavalier, General Manager
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Sheraton Toronto East, General Manager

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Trudy Bauer
Rekha Khote
Curtis Fernet
Linda Burke
Thomas Wah

APPENDIX C

CASE STUDY SUMMARIES

Case Study C-1: Australian Accommodation Industry

Case Study C-2: Leasing Out Food And Beverage Operations

Case Study C-3: Instilling A Service Culture

Case Study C-4: Implementing Self-Directed Work Teams

Case Study C-5: Introducing Stronger Human Resource Development Practices In A Small Inn

Case Study C-6: Maintaining Standards At A Small Inn

Case Study C-7: Providing Corporate Human Resource Support To Franchisees

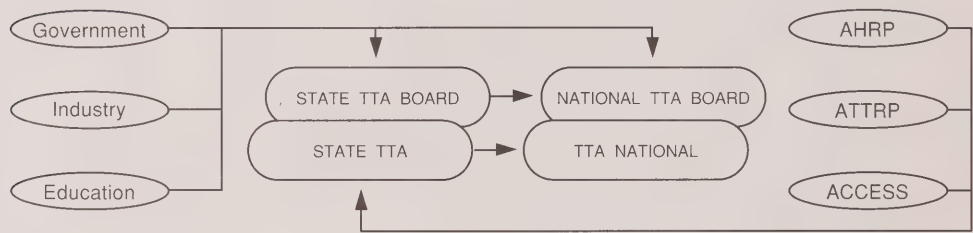
CASE STUDY C-1

AUSTRALIAN ACCOMMODATION INDUSTRY

The Australian case study focused on the roles of and challenges faced by key stakeholder groups in the Australian accommodation industry. The Steering Committee requested investigation of the Australian industry based on perceptions that Australia was among the most advanced nations in the integration of human resource development practices among employers, employees and support organizations (e.g., educators, government, industry associations).

Overview: The case study was conducted by tourism consultants in KPMG's Sydney and Adelaide offices. Interviews with representatives of hotel owners, hotel and tourism industry associations, educators and Tourism Training Australia were undertaken by telephone and in person.

Tourism Training Australia (TTA-the trade name of the National Tourism Industry Training Committee) is a non-profit company established by the tourism industry with the support of the Australian government to identify the training needs of the industry and to take action to meet those needs. The TTA is the co-ordinating national body for a federation of seven state/territory based committees each represented by state and federal government, industry and employee associations and training providers. Each state committee sends a representative (usually the chair) to the national board of TTA. These state-based representatives are supplemented by a range of representatives from key stakeholder groups (industry and employee associations government agencies and education). TTA is recognised by the National Training Board as the Competency Standards Body for the tourism and hospitality industry. The general structure of TTA is presented below:



TTA administers three general programs: AHRP, ATTRP and ACCESS.

AHRP: Australian Hospitality Review Panel has been established to grant industry recognition to programs achieving industry standards of training as set by the panel. The AHRP is a national body comprised of the following organisations:

Australian Hotels Association
 Club Managers Association
 Liquor Trades Union
 Private Hospitality Colleges
 Registered Clubs Association
 Catering Institute of Australia
 TAFE (Technical and Further Education)
 National Restaurant Association
 Australian Workers Union
 State Training Authorities
 Motel and Motor Inn Association
 Tourism Training Australia

AHRP sets minimum standards of training in line with industry requirements, provides consumer protection through on-going quality control, provides the framework for the development of structured career paths, facilitates portability of qualifications across programs and states, and promotes training in the tourism industry.

The AHRP offers industry accreditation for all programs recognised as meeting industry needs. The programs may be provided by TAFE, universities, private providers, industry associations and industry “in-house” programs.

Programs eligible for recognition cover skills in food and beverage service, kitchen, guest relations, supervision and management. The standards to be met by training providers are based on national competency standards endorsed by the National Training Board.

ATTRP: The Australian Tourism Training Review Panel is a national body comprised of the following industry organizations:

Australian Federation of Travel Agents
 Inter Air Transport Association
 Inbound Tourism Organization
 Australian Services Union
 Liquor Trades Union
 Qantas
 Private Training Providers
 TAFE
 Australian Institute of Travel & Tourism
 TTA

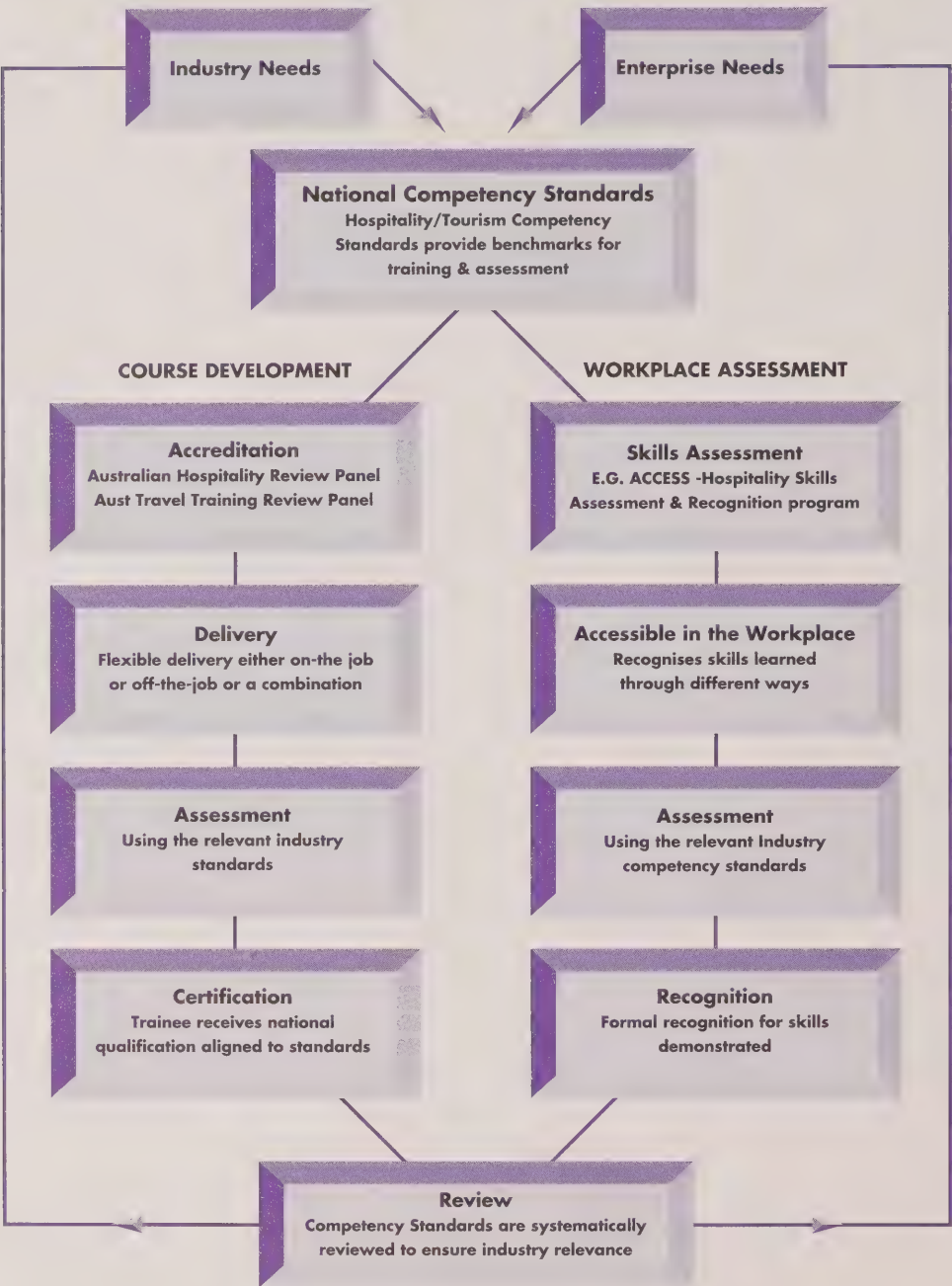
The ATTRP grants industry recognition to those training programs which meet the minimum training requirements set by the industry. Its terms of reference are similar to those of AHRP except tailored more specifically to the tourism industry (rather than hospitality).

ACCESS: This is the system for recognition of skills through workplace assessment.

Exhibit C-1 contains a flow-chart of the Australian Tourism Industry Training System.

EXHIBIT C-1

AUSTRALIAN TOURISM INDUSTRY TRAINING SYSTEM—
AN INTEGRATED EDUCATION & TRAINING SYSTEM



Educators and Tourism Training

Australia: The educators view their role as providing technical and applied management skills to people wishing to enter, or be retrained to enter, the tourism industry. The educational community believes some independence must be maintained from employers, with a focus on a strategic rather than reactive approach to skills development. This is a similar finding to that in Canada. Educators believe that industry's view is often too short term and/or focused on current "fads" as opposed to longer-term needs. Key comments from educators include:

- Government policy to funding and supporting programs is based on Tourism Training Australia's mandate. TTA has a tripartite advisory board comprised of industry, union and government.
- A major impediment within industry is a broad lack of general management skills among industry "professionals". Course content has been structured to remedy this situation, but time will be required for graduates both to enter the industry and to rise to managerial levels.
- Hospitality programs are generally oversubscribed two to one. Positions allocated to domestic students, mature students, and overseas students are all oversubscribed. A general belief exists that enrolment pressures will increase over the next five years. Placements within the industry have been estimated as high as 97% upon graduation.
- Process of maintaining instructor contact with industry appears more defined than in Canada. In addition to the usual desirability of association memberships and attendance at industry conferences, instructors in some operational courses are expected to spend 20% of their time in industry consultation and contact. About half of the instructors in technical courses are part-time, the balance of their work week is spent in industry.
- A need for broader human resource training has been identified. Specific skill deficiencies are organizational planning, employee relations and change management.

Industry associations: Like Canada, the past three years have not been kind to the accommodation industry, a result of the recession, overbidding and competition based solely on price. Although tourist arrivals are up along with occupancies, the return to a solid financial footing is some time away. Also as in Canada, the primary focus is on improving room rates. Other views and comments are summarized below:

- The proportion of domestic travellers will drop from 70% to 50% by 2010, in favour of increased international tourists. Convention and meeting segments hold particular opportunity. These trends are seen as a means of attracting accommodation managers to Australia from other countries.
- Geographic diversity makes the ability of any one association to speak for the industry very difficult. Most human resource functions and training initiatives are left to Tourism Training Australia. National industry associations are represented on the Board of TTA.
- The Australian Tourism Students Association—a network of students and graduates of recognized courses—acts to develop higher professional standards and business development opportunities.
- Trend towards "multi-skilling" rather than specialists. Service mentality needs to be strengthened.
- No mechanisms have been developed or communicated that demonstrate the return on investment in training.
- Tourism is considered a major economic contributor at the state level; less so at the federal level. As in Canada, "tourism" is amalgamated with other interests at the cabinet level and often seen as a stepping stone for junior ministers.

Employers: Recessionary conditions in early 1990's and corresponding financial implications saw staff reductions and "management structures flattened with less middle management . . . giving greater responsibility to line employees." Other comments by employers interviewed for this case study include:

- Training is almost always on-the-job, in a demonstration format. Managers are encouraged to study at recognized institutions.
- Internal certification has been accredited by the Australian Hotel Association.
- Multi-skilling is being undertaken as a means to enhance customer service, improve staff morale and more efficiently manage payroll costs.
- Occupations with lowest turnover are housekeepers, bellpersons, accounting and clerical staff; greatest turnover in food and beverage, particularly chefs. Internal surveys of employees and regular employee meetings have served to reduce turnover to an extent.
- Previous work experience is a "must have" for chefs, management staff at all levels and reservations clerks. For all other positions, attitude and personal attributes are given more emphasis.
- Chefs will continue to be in short supply.
- New technology is only deployed in those areas where a financial return (e.g., less time involved in processing guests at front desk) or direct guest benefit can be demonstrated (e.g., voice mail). Currently front desk, reservations and food and beverage (i.e., point-of-sale systems) are major areas of use. Cost of purchasing hardware systems is a major barrier to future implementation.
- Government agencies, educators and the large number of industry associations are perceived as not doing a good job supporting the industry. The large number of industry

associations, ineffective government programs and educational institutions offering too much theory and not enough practical study suggest that expectations have not been properly managed.

Employers generally believe the accommodation industry is an "employee's market", where experienced employees are able to seek out higher-quality, better compensated positions. Some employers are concerned however, regarding the small number of entry-level applicants for existing positions. This position appears to contradict the view of educators.

Common views: Among all stakeholder groups some common themes were identified, specifically:

- Image of industry and industry jobs in Australia is similar to Canada: transitory workplace, poor compensation and little respect of career worth.
- Positive attitude is a key criteria for determining acceptability of applicant for educational program or accommodation industry job.
- Fragmentation of educational community. Some 20 colleges and universities offer tourism studies—still a substantial reduction to the number offered in Canada.
- General belief that quantity and quality of employees—and students entering the industry—is adequate. However, there is also concurrence that a training need exists at the middle and senior management level where incumbents lack appreciation of current practices and trends.
- Multi-lingual skills a requirement. Japan is one of the largest originators of overseas demand.

Summary Observations: Overall, the issues faced in Australia are very similar to those in Canada. Similarities among the positions and perceptions of various stakeholders groups are also apparent.

CASE STUDY C-2:

LEASING OUT FOOD AND BEVERAGE OPERATIONS

This case study analyzes the effects of leasing out a hotel's food and beverage operation—a growing industry trend. The case study identifies some of the operational and human resource issues associated with the leasing out of the food and beverage operations.

Property overview: The 389-room Crowne Plaza Winnipeg Downtown (Crowne Plaza) is located in the heart of the city, and is connected to the Winnipeg Convention Centre. The hotel is considered one of the premiere hotels in the city—in terms of market positioning, location, and banquet facilities. In 1993, the hotel had two restaurants: J.J. Hargraves and Between Friends. Between Friends has been operated by an independent, local restaurateur since January, 1993. The hotel is not unionized.

Background: In the summer of 1993, the Royal Bank (the hotel's major commercial tenant) announced its intention to terminate its lease after fifteen years. The leased space of approximately 4,400 square feet occupies one corner of the lobby and enjoys high street visibility. Based on the relatively poor financial performance of J.J. Hargraves, the decision was made to lease the commercial space to an outside restaurant operator and close the restaurant. The space previously occupied by J.J. Hargraves would then be converted to another food and beverage concept that would also be managed by the outside restaurant operator.

Conversion plan: In December 1993, an agreement was reached with Elephant & Castle to open a restaurant/pub in the space previously occupied by the Royal Bank. J.J. Hargraves would be closed and converted to an Elephant & Castle Express. The hotel's food and beverage department would continue to operate room service, banquets and a small lounge. The anticipated timing to open the new restaurant/pub was three months (i.e., March 1994).

The hotel's management maintained control over several important restaurant operating policies and practices. For example, the lease agreement stipulates that:

- The Elephant & Castle would introduce a breakfast menu and be open for all three meal periods;
- All Elephant & Castle employees would attend a hotel orientation program;
- Changes in Elephant & Castle operating hours require prior approval by hotel management;
- Appointment of a new Elephant & Castle manager requires prior approval by hotel management;
- Menu changes must be approved by hotel management.

Communication with staff: When the agreement was reached with Elephant & Castle, two staff meetings were held with all affected kitchen and waitstaff to advise them of the impending changes. One staff meeting was for employees that would be offered another position in the hotel. The other staff meeting was for employees who were told that they would not be offered a position with the hotel. However, employees in the latter group were told that they could apply for a position with the new operator and they would be provided with training to assist in their job search (e.g., resumé writing skills).

Several delays caused the opening of the Elephant & Castle to be delayed three months until May 1994. Although staff were kept informed of the delays, uncertainty continued as to the definite opening date. In addition, the new operator did not begin to hire employees until approximately one month prior to opening. Therefore, despite ongoing communication from management, staff that would not be employed by the hotel after the closing of J.J. Hargraves felt frustrated and apprehensive.

Impact on operations: The hotel appointed an Outlets Manager who is responsible for the day-to-day interaction with the Elephant & Castle manager, as well as overseeing the hotel's remaining food and beverage operations. Through this interaction, the hotel has been able to monitor and influence Elephant & Castle's policies and procedures—for example, off-shift Elephant & Castle employees cannot wear their uniform in the bar.

Issues: The two major issues raised by hotel and restaurant/pub staff were the transition, and how the Elephant & Castle fits in with the overall image of the hotel.

Two distinct perspectives may be offered on how the transition was handled. The employees terminated by the hotel after the Elephant & Castle opened, felt "frustrated, abandoned and deceived." They felt that there should have been better channels of communication (between them and management) and more empathy. Employees that had secure employment with the hotel felt sympathy for those employees, but felt that the decision to lease out the restaurant was correct and that the affected employees were given sufficient notice. There was general agreement that the human resource ties between the two operations could be strengthened—for example, by offering a similar benefit package (e.g., use of health club), or including restaurant employees in the general hotel staff meeting.

Staff expressed some concern over whether the restaurant/pub concept was consistent with the Crowne Plaza's image. In addition, guests perceived the Elephant & Castle to be part of, and operated by, the hotel and, therefore, expect hotel staff to be able to resolve any complaint immediately. This was especially a problem when the Elephant & Castle first opened—improved service levels at the Elephant & Castle have since reduced the number of guest complaints received by hotel staff.

Impact: The leasing of the restaurant is viewed by management as having had a positive impact:

- The change was accomplished in a relatively short period of time (i.e., 5 months).
- Most of the affected staff (i.e., 19 of 22) have secured employment with Elephant & Castle.
- Many of the initial difficulties in integrating the two operations have been resolved and guests are satisfied with the food and beverage product being offered by the hotel.
- Financially the arrangement has proven to be lucrative—based on lease revenue and food and beverage profit margins. The food and beverage department's profit margin has nearly doubled (both as a percentage and in absolute dollars) in the first five months of the current fiscal year.

Summary observations: Many of the issues described in this study are inherent to the implementation of any major change. Communication is essential in ensuring a smooth transition—communication among the three involved parties—hotel manager, restaurant/pub company, and employees. The uncertainty of when the new restaurant would open made a difficult transition process even more difficult.

The challenge of managing the relationship with an outside operator is always great. In this case, the challenge is compounded because the operator controls an integral component (i.e., restaurant) of the hotel operation, and the restaurant is perceived by many guests as being managed the hotel. Hotel management has dealt with this challenge by identifying the expectations of both parties (i.e., Crowne Plaza and Elephant & Castle), detailing operating guidelines in the lease agreement, and assigning responsibility for day-to-day interaction to a specific management representative.

CASE STUDY C-3:

INSTILLING A SERVICE CULTURE

This case study describes the process followed by a new management team at a major urban hotel to instill a service culture among employees.

Property overview: The 372-room Holiday Inn Toronto Yorkdale has been open for twenty-five years. The hotel had been successful in the early- and mid-1980s, but beginning in the late-1980s the hotel lost market share with a corresponding decline in revenue. The hotel is unionized.

Change in management: A new General Manager and Food and Beverage Director were brought to the hotel five years ago. At that time they determined that a stronger service culture was required. The implementation of this new culture required a strong commitment to training—in terms of financial resources and senior management time.

Recruiting: All applicants go through three interviews prior to being hired—human resources, department head, and executive management. The hotel uses a behavioural interview process that is designed to ensure that the candidate is suited for the hospitality industry. The candidate must demonstrate strong interpersonal skills (with guests and co-workers), genuine desire to serve guests, and strong core competencies—not necessarily technical skills. All new employees attend a four-hour orientation program and spend, on average, forty hours on training. After one month of employment, the Director of Human Resources and Department Manager meet with the employee to ensure that the employee has been sufficiently trained and has a good understanding of the operation of the department and hotel.

Communication: The first stage of the implementation was to work towards employee satisfaction within the workplace and to enhance employee trust in management. An employee survey was conducted by the human resources department to gauge employee satisfaction within the workplace and identify issues in each department. Department heads then created focus groups of line staff from the departments to address and rectify these issues.

Management's commitment to address these issues served to strengthen the relationship between management and employees. The resulting employee trust allowed management to proceed to the next phase of the implementation—training and empowerment of employees.

Training: All employees attend a minimum of twenty hours of skills/guest service training each year. The sessions are very interactive—and motivational—and bring together employees from different departments. Service training addresses service standards, greeting/welcoming the guests, product knowledge, upselling, and handling guest complaints. Service recovery training has taught staff to empower themselves. Through role plays, employees gain an understanding of the type of actions that can be taken to satisfy a guest—this may range from a simple apology to a full rebate of charges. The hotel has developed ten types of welcome gifts that employees can send to guests. These gifts are accompanied by a personalized note from the employee. The goal is to achieve 100% guest satisfaction.

Additional training is done at the department level, where the majority of employees are cross-trained in other department positions. This allows for better service, more flexibility in scheduling and the opportunity for employees to work forty hours per week.

The concept of teamwork is emphasized in training sessions where employees are encouraged to provide examples of how teamwork helped improve service. Exceptional teamwork is rewarded by the "Apple" program, where staff recognize other employee's great service and teamwork. Employees are also encouraged to provide continual feedback on operating policies and procedures. Food and beverage staff are involved in developing menu programs and promotions. Once a year all employees in a department meet to develop action plans and review/revise service standards for that department. As a result, management believes service standards have been improved and, perhaps more importantly, are being delivered more consistently.

Culture: Management has strived to instill a team culture throughout the hotel. The General Manager hosts a semi-annual meeting with all the staff at which information on the hotel's performance, customer satisfaction and industry trends is discussed. To celebrate the multi-cultural character of the hotel, every month in the staff cafeteria an ethnic lunch is served by employees of that ethnic origin to the rest of the hotel staff.

Finally, the commitment to service is clearly communicated to guests by various actions, including: having a member of the administration team present in the lobby during peak periods every morning and evening, and posting the hotel's mission statement in the lobby. In part the mission statement reads "...We promise to meet your expectations each time you visit with us. All of our staff are empowered to ensure your complete satisfaction...."

Impact: The service culture has been embraced by the majority of hotel staff and staff has developed into more of a team—union and non-union staff work closely together. The "not my job" attitude that existed previously, no longer exists. In addition, the most recent employee survey found that employee satisfaction was rated at 98%. This corporate employee survey asks employees to rate ten aspects of their employment (e.g., overall work experience, opportunities to learn new skills, fairness and integrity of management, and promotion and advancement opportunities). Management feels that "contented" employees will have a direct influence on improved operating results.

As for tangible results, the hotel has received a coveted international, chain-wide award for service excellence for each of the last two years—the hotel had never previously won this award. Judging for the award is based primarily on guest comment cards with special emphasis being placed on the guests' stated intent to come back to the hotel. According to hotel management the guest return rate has increased from 67% to 96%. Increased guest returns is one of the reasons the hotel's gross revenue increased by 10% in the last fiscal year, with a similar increase forecast for the current fiscal year.

The Holiday Inn Toronto Yorkdale's commitment to training and instilling a service culture is well documented. The hotel has been nominated for a training award with the Ontario Tourism Education Council and its approach to implementing a service culture was profiled in an Ontario Innkeeper's article entitled "Survival Strategies for the 90's". In addition, one of the hotel's longest serving employees won the meritorious service award from the Ontario Hotel and Motel Association.

Summary observations: The commitment to a service culture has to permeate from management to employees. Employees have to believe that management will support their actions and decisions, and have to see that management's actions are consistent with the stated mission. This trust is the basis for the development of a service culture.

CASE STUDY C-4:

IMPLEMENTING SELF-DIRECTED WORK TEAMS

This case study examines how one property has implemented self-directed work teams in different departments. Self-directed teams are a new trend in the industry and are being implemented to varying degrees by different hotel chains.

Property overview: The 198-room Hotel Macdonald, located in Edmonton, was re-opened in 1991 after a \$28 million restoration program. The hotel is owned and managed by Canadian Pacific Hotels & Resorts and is considered the premiere hotel in the city—in terms of average daily rate and market positioning. The hotel is not unionized.

When the Hotel Macdonald opened, approximately 5,000 people applied for 200 available positions. All successful applicants went through a five-point screening process—the process began with a quick screen of applicants that eliminated over half the applicants, and culminated in an interview with the General Manager. From the General Manager's perspective, one of the key hiring criteria was attitude (i.e., "People that enjoy serving people"). The final decision to hire required the unanimous approval of the General Manager, Division Head, and Director of Human Resources. This thorough recruitment process is seen as an investment in the future and is credited with the hotel's low turnover rate—117 of 200 employees have been with the hotel since opening in 1991.

Background: In 1993, management felt that the hotel's profit margins had improved to a point where additional increases could not be achieved through traditional means. The local market could not support a significant increase in the average room rate, and limited additional major operating efficiencies could be implemented. Therefore, further de-layering of the management levels—through the introduction of self-directed work teams in selected departments—was seen as the next logical step.

Self-directed team concept: As proposed, self-directed work teams would assume, over an extended period of time, total operating responsibility for a business unit. The team would work closely with a coach (generally the Department Head or Director), who would act as the liaison with senior management. From a human resources perspective, the objective of self-directed work teams is to improve guest service and employee professionalism, increase employee morale and job satisfaction, and increase employee pride and ownership in their workplace through empowerment.

Roll out of self-directed work teams:

The Hotel Macdonald has implemented self-directed work teams on a gradual and select basis. The work teams have been implemented at the business unit level (e.g., Library Bar), as opposed to a department level (e.g., food and beverage department). Work teams were only considered in business units where a supervisory position became vacant and where the employees were perceived by management as ready to become "self-directed." The hotel did not lay off management in order to implement self-directed work teams. Ideally, employees in the business unit would demonstrate initiative, leadership skills, team culture, and pride. These employees also receive additional training to help with the transition to a self-directed work team.

Departments affected: Over the course of the last two years, self-directed work teams have been introduced in four areas of the hotel—three of which are still operated in this manner. The Library Bar has eight employees and has been operated by a self-directed work team since the fall of 1993—the longest of any business unit at the hotel. The hotel's other food and beverage operations (including the Harvest Room, the principal restaurant) continue to be managed in the traditional manner.

The Library Bar's self-directed work team has been successful in managing the outlet on a day-to-day basis. The team has been active in establishing promotions and suggesting changes for day-to-day operations (e.g., changing uniforms). The team is now in the process of revising some of the broader policies and procedures such as the training manual, and procedures that require the Food and Beverage Manager's authorization. In addition, the team has relied on their coach for assistance in providing feedback—including evaluations—to one another, and for financial planning.

The other business units still operating as self-directed work teams are the health club (since the fall of 1994) and the guest service attendants (i.e., bellclerks, since January 1995). Room Service experimented with a self-directed work team approach, however reverted back to the traditional organizational structure. One of the principal reasons why the Room Service work team was not successful, was that the level of communication between team members and their lack of commitment was not sufficient to support the implementation of self-directed work teams. In addition there were some cultural barriers (e.g., employees accustomed to, and more comfortable with, working in a rigid hierarchy). Management does not believe that these problems could be resolved through additional training and/or coaching.

Implementation process: The following are the key steps in the successful implementation of a self directed work team:

- Obtain staff buy-in. In order to succeed, the concept of self-directed work-teams has to be accepted by all affected employees. The employees have to "embrace" the initiative. An initial team meeting should be used to: discuss the concept of self-directed work teams and its applicability to the area, begin instilling the team culture, identify the work team's tasks and responsibilities, and discuss the role of the "coach".
- Provide training. Both the team members and coach need to be trained on how to work as a self-directed work team. The Library Bar team identified a "Team Power" training program as

being very valuable because it allowed employees to know each other better and to understand each others' strengths and weaknesses. This type of training program also demonstrates the power of working together as a team. The coach may need additional training on developing member's teamwork skills, coaching, and how to effectively delegate and empower responsibility to the team.

- Assign responsibilities and tasks relative to team interests and strengths of team members. The team must identify all tasks and responsibilities to be undertaken (e.g., schedules, payroll, promotions, purchasing). The team must then decide which tasks will be performed by members and which will be the responsibility of the coach. Over time, more tasks will become the responsibility of the team. Team members will volunteer to perform these tasks for a six-month period, at which time the tasks may be rotated to other team members.
- Set guidelines for subsequent meetings. Team members must determine the frequency of work team meetings and select a chairperson for the meetings.
- Define the role of the coach. The coach is the liaison between the work team and senior management. The coach must support the efforts of the team by providing guidance that will help ensure the team's success. The coach must also allow the team to make mistakes from which they can learn. The coach will likely provide support in the human resources (e.g., hiring, evaluations, discipline), and financial areas (e.g., operating budgets, capital costs). In addition, the coach may have to assist the team in conflict management.
- Provide corporate support. Hotel management must assist the work team in order for it to succeed. Support can be provided by fostering a cultural change in the hotel so that other departments recognize and support the work teams, even though team members do not have the "position" authority.

Some of the issues identified by co-workers in implementing self-directed work teams include having a clear understanding of what is required from the work team, and employees buying into the process.

Employee resistance may be due to internal power struggles within the team, fear that not everyone will contribute equally to the success of the team, and poor communication between team members.

Impact: Several ways exist to assess the impact of self-directed work teams, including: guest comment cards, operating costs/ratios, revenues, team interaction, performance evaluation, and operating standards.

According to hotel management, implementation of a self-directed work team in the food and beverage outlet has resulted in labour savings through the elimination of one level of supervisory management, improved scheduling, more flexibility (e.g., employees leaving shift early during slow periods), and increased cross-training. The total annual labour savings to date are 50% more than the former outlet manager's annual salary, including benefits.

The implementation of self-directed work teams also had a positive impact on employee morale. The Library Bar self-directed work team talk about the pride they feel for their outlet and how they feel a responsibility to their team. In the last employee opinion survey, the Library Bar had the highest results (e.g., employee morale) of any food and beverage outlet at the hotel. The team feels they have had a positive impact on the outlet's performance and sales, and have established a strong relationship with the other departments in the hotel. The most telling comment is that team members cannot imagine working in a traditionally-run restaurant.

Summary observations: The concept of self-directed work teams, or some hybrid thereof, is expected to become more prevalent in the future. Of interest, is that the introduction of self-directed teams can be done at a slow, controlled pace. Select areas (e.g., food and beverage outlet), and not entire departments, are best suited for conversion to self-directed teams. In implementing self-directed teams, adequate support—such as training and coaching—must be provided to both employees and affected management. In addition, changes in the selection criteria when recruiting new employees may need to be made. Currently, many hotels are recruiting employees to work in a structured (i.e., supervised) environment—these employees may not necessarily be able to adapt to working in a self-directed work team.

CASE STUDY C-5:

INTRODUCING STRONGER HUMAN RESOURCE DEVELOPMENT PRACTICES IN A SMALL INN

This case study analyzes how the new owner/operators of a small, unionized inn located in rural Quebec have been able to implement stronger human resource practices over the course of three years.

Property overview: The Auberge Benedict Arnold is located on a 600,000 sq. ft. parcel of land in the Town of St-Georges, in the Beauce region of Quebec. The nearest major centre is Quebec City, which is approximately a one and a half hour drive away. The 50-room property has 2 dining rooms, a bar and 5 meeting rooms—the largest meeting room can accommodate 140 persons banquet style. The food and beverage operation is considered to be one of the Auberge's strengths and is used as a key selling feature. The property has received several awards, including being voted one of the 3 best dining establishments in the Chaudiere-Appalaches region and being awarded the *Plateau de l'excellence* for quality service by the Association of Foodservice distributors of Quebec.

Staffing levels: The property employs 52 staff (including management), of which 25 are full-time, 10 are regular part-time and the balance are occasional. These staffing levels do not increase significantly during the peak season (summer)—part-time and occasional employees work more hours. The majority of staff are long-term employees, with an average length of employment of eleven years. The property is unionized.

Change in ownership: Since acquiring the inn three years ago, the new owner/operators—a husband and wife team—have made significant capital investments in renovations and technology. The front desk and food and beverage (including kitchen) areas have both been automated. In addition, stronger human resource development practices have been introduced, including: increased training, implementation of standards and operating policies, and improved lines of communication with employees.

Recruiting: The owner seeks different skills for each department. For the front desk, the applicant should demonstrate initiative, attention to detail, interpersonal skills, team orientation, and be bilingual. For kitchen staff the desired skills are technical ability, flexibility in working hours, and a desire to try innovative techniques. Housekeepers should be able to work independently, be well organized, and be able to follow a process completely. All new hires receive extensive training (primarily through a "buddy system") prior to being left to work alone.

Training and education: Several training initiatives have been undertaken during the course of the last two years. The majority of training sessions are done on-site as the owner believes that training of, for example, kitchen staff is four times more effective when conducted on-site and staff can use their own equipment.

Various training programs are offered to existing staff. Front office staff attended a one-day intensive training course on techniques for welcoming guests and being aware of different client types—offered by the Tourism Association of the Chaudiere-Appalaches region. In addition, employees receive training on various software packages. Kitchen staff voluntarily participated in a fifteen-day training program (conducted on weekends) on presentation techniques and preparation of sauces. Waitstaff participated in various training sessions on wines, service, and training on the new computer program. The assistant manager has completed a marketing course offered by a CEGEP, and is currently participating in a human resources management course. Other training courses offered to staff include a half-day people management course and floral arranging course.

The owner expressed a great interest in a need for academic institutions to offer more courses at the employer's work place.

Culture: The owners have tried to foster team spirit among employees and a sense of ownership and pride in the hotel. This has been accomplished by improving the communication with employees by having regular department meetings and an annual staff meeting. At the annual staff meeting the owner provides an overview of the hotel's major activities in

the previous year (e.g., renovations, capital acquisitions, training initiatives) and identifies and discusses the objectives for the coming year (e.g., budgeted occupancy rates, gross revenue and planned marketing activities). Most departments have a regular staff meeting every two months at which employees are encouraged to discuss their concerns and provide suggestions for improving the operation. These suggestions are submitted on a form that asks employees to identify two "dream" changes in either their department and/or the Auberge generally. The owner takes these suggestions seriously and has acted on 90% of the suggestions received. In addition, the employees are asked to compare the Auberge with competitors and identify the Auberge's strengths and weaknesses.

Impact: The owner has indicated that gross revenue and occupancy rates have increased over the last two years and he expects that the record revenues achieved in 1989—the Auberge's best year— will be achieved this fiscal year.

Summary observations: Improving human resource practices requires the strong and continued financial (e.g., pay for external training) and time (e.g., improve the level of communication with employees) commitment by owner/operators. According to the owner/operators, the pay-off for this commitment is improved employee skills and increased employee pride in the property. The benefit is a better level of service and product (possibly representing a competitive advantage) and increased revenue.

CASE STUDY C-6:

MAINTAINING STANDARDS AT A SMALL INN

This case study examines how an owner/operator of a small, rural inn in Atlantic Canada has dealt with a difficult labour market and been able to maintain high guest service standards.

Property overview: Established in 1938, the family-owned Laurie's Motor Inn is situated in the small French Acadian fishing community of Cheticamp, Nova Scotia, on the Cabot trail. This 53-room property has a dining room, lounge, meeting facilities and two chalets. The Inn won the 1993 Tourism Industry Association of Nova Scotia ("TIANS") Accommodation Award. The dining room is listed in the "Where to Eat in Canada" guide. The Inn rents bikes to guests and operates a 43-foot boat that is used for whale-watching cruises. The Inn caters to all markets including leisure, commercial, government and tour groups. Since 1985, Laurie's has invested almost \$2.5 million in renovations and expansions. Much of this funding has been provided by the Atlantic Canada Opportunities Program.

Market positioning: Much of the Inn's promotional material addresses the emerging eco-tourism trends by emphasizing the different outdoor activities the region has to offer. Brochures also describe the Region's different historical sites and attractions. The owner has attended a number of national and international trade shows to promote his property and educate the public and tour operators about Atlantic Canada, Nova Scotia, Cape Breton and Cheticamp.

Staffing levels: The Inn is open all year and provides employment to three full-time directors, and 12 full-time staff. All the staff work part-time during the winter and full-time during the summer. During the Inn's busy season (May 1 to October 15), Laurie's may employ up to 38 full-time seasonal employees and two part-time staff. The majority of the seasonal employees hired have worked at the Inn during previous summers. The average length of employment for full-time staff is five years.

Labour force: One of the greatest human resource challenges facing this property, and other similar properties in Atlantic Canada, is finding employees willing to work full-time during the year. The owner has found that some employees want to work only long enough to be eligible for unemployment insurance benefits (i.e., 12 to 14 weeks). These employees want to make the highest insurable weekly earnings during the summer and be laid-off for the winter. The employees that do continue to work during the winter either want to work a minimum number of hours a week (in order to remain on U.I.), or work and bank their hours for the summer.

Human resource strategy: Over the years, the owner has developed and implemented simple but effective human resource practices. In general, these practices are intended to improve the level of employee skills and guest service. Guest satisfaction is considered the key to increasing profit margins. Therefore, the owner welcomes any opportunity to train employees to provide better guest service. Employees interviewed confirmed the owner's commitment to training.

Recruiting: From the owner's perspective, one of the key hiring criteria is attitude—especially for front-line employees. Prior work experience and/or formal education in the hospitality industry were also perceived as important—primarily to ensure that the applicant understood the industry. Prior work experience and education were considered less important for some positions (e.g., janitor, room attendants, food service helper).

Training and education: Training of existing and new employees is done through informal, on-the-job training. New hires are trained through "job shadowing." The operator has benefited from several government-sponsored training initiatives. Front-desk clerks, room attendants and waitstaff have, for the most part, all taken certification courses. These certification programs were offered for free by TIANS or the local employment centre. Some staff are enrolled in government-funded hospitality courses at the local community college. Four employees will be attending the "Better Host Program." This course is given by the province and the cost is shared equally by the employer and

employee. Employees did not, however, relate training opportunities to rewards or career advancements.

Impacts: According to the owner, employees now have a better understanding of both their jobs and customer needs. These training initiatives have resulted in improved guest service, increased guest satisfaction and increased revenue.

Summary observations: The owner's support and strong ties with TIANS has enabled the owner to have a high level of training at this property, and maintain a high level of guest service, despite a difficult labour market.

CASE STUDY C-7:

PROVIDING CORPORATE HUMAN RESOURCES SUPPORT TO FRANCHISEES

The growing trend of brand affiliation in the Canadian accommodation industry has implications for the support and services provided by the franchisor to franchisees. This case study examines the human resources support provided by a major international franchisor to its Canadian franchisees. (Note: Other franchise or management companies also provide varying levels of human resources support to their franchisees.)

Franchise overview: ITT Sheraton is one of the world's largest hotel franchise companies, with eighteen properties located throughout Canada, ranging in size from 112 rooms to 1,392 rooms. Fourteen of these properties are franchises.

Benefits to franchisees: Interviews with the company's franchisees and corporate management, suggest that the key criteria for selecting the franchisor are: brand awareness, marketing/sales system and support, reservation system, support services, and fee structure. The criterion of support services encompasses several areas including human resources. One franchisee indicated that in the future, human resources support (e.g., occupational standards and overall policies) will become a key differentiating factor when selecting a franchisor.

Franchise agreement: ITT Sheraton provides its franchisees with access to a series of human resources support services (e.g., programs, policies, and standards). These support services are expected to form the basis of the franchisees' human resource practices and policies. In the franchise agreement, the Company also specifies certain minimum service standards that must be met (e.g., room service delivered within thirty minutes to guest room) and monitored.

Monitoring service levels: From the franchisor's perspective, maintenance of service levels provided at all company-managed and franchised properties is an ongoing concern. ITT Sheraton has at least three tools to assess the service levels provided at a hotel:

- Guest surveys—Survey results are compiled every quarter by an outside consulting firm. The surveys measure overall guest satisfaction and intention to return. The property's results are then compared to all North American hotels and to all similar type properties (e.g., hotel or inn).
- Employee survey—Survey results are tabulated every six to twelve months and are based on over 50 close-ended and five open-ended (i.e., written response) questions.
- Property inspections—Every six months a company representative conducts a property inspection. While the focus is on the physical premises, service standards are also reviewed.

The results of this three-part process are discussed with the franchisee. Such discussions may lead to the identification of specific human resource initiatives that should be undertaken by the franchisee.

Human resources support: ITT Sheraton provides human resources support to franchisees through:

- "Guest Satisfaction System"—Four basic service standards for all staff that identify how to interact with guests.
- Hub training—A series of eight training courses are offered every quarter. The courses focus on leadership management, room/reservation merchandising and customer-focused selling skills. The sessions are offered at a central hotel and are made available to all franchisees. Costs for course materials are nominal. The major expenses for individual franchisees are travel and the cost to cover the shifts of the employee attending the training program.
- Training policies and procedures—Complete set of training manuals for each hotel department. The manuals identify performance standards required for principal tasks in each position, and provide a series of tests for that position.
- Access to material from the American Hotel & Motel Association's (AH&MA) Educational Institute—Specific training programs are

available to the company's franchisees at a discounted price. In addition, consideration is being given to introducing two skills training programs that will be customized for use by individual properties.

In addition, ITT Sheraton's corporate human resource experts are available to assist franchisees with specific human resource issues.

Success of these support services: The use of the support services provided by the company varies between franchisees and depends on management's commitment to human resources and training. For example, although hub training is generally perceived as a valuable service, not all franchisees participate—probably due to travel costs. In addition, some franchisees feel that hub training is directed to management and supervisory levels, and that a greater need exists for training of line staff. The company is addressing this concern by examining training alternatives available through the AH&MA. The training manuals form the basis, or at a minimum represent a valuable reference tool, for training done at the properties. However, some franchisees believe some updating is required (most were developed more than five years ago), and all need to be modified to reflect the unique characteristics of the individual franchisee. Most franchisees augment the Sheraton training manuals with AH&MA and other materials for specific training needs.

Additional support services that could be provided: Franchisees interviewed were generally satisfied with the human resources support provided by ITT Sheraton, and felt that this level of support was better than many other franchise companies. However, they identified several concerns that are inherent to all franchise companies:

- Lack of career planning—Career planning is limited to opportunities at the specific property, rather than within the overall chain. Gaining broader experience—for example, rotating through food & beverage, rooms and other departments—is limited to position availability at the time.

- Lack of transfer opportunities—Few transfers to other ITT Sheraton properties occur, in comparison to company-managed hotels, due to relocation costs, seniority (non-transferable), and concerns of losing employees to other properties. The lack of transfer opportunities is a major factor, as a leading attraction of joining a hotel chain is the perceived opportunity to transfer to other properties.
- Lack of consistency in employee benefits.

Overall summary: The axiom that "You are only as strong as your weakest link" is especially relevant to hotel franchise companies. Franchisors will likely place additional focus on human resource practices in the future and will be more directive in the improvements that should be undertaken. In the opinion of two of the franchisees interviewed, this will result in a stronger franchise brand that will serve to attract stronger operators.

APPENDIX D

CURRENT STATUS OF OCCUPATIONAL STANDARDS AND CERTIFICATION IN CANADA

"Certification provides industry recognition of an individual's knowledge, skills and attitudes based on industry standards. It is a credential. Credit is earned for industry experience, skills and knowledge. The certificate is awarded to individuals who demonstrate, through written and practical testing, that they meet the standard."—
The Canadian Tourism Human Resource Council. **Occupational Standards & Certification for the Canadian Tourism Industry, 1995**

The table on the following page provides a list of occupations in tourism sectors, including accommodation, for which standards and/or certification exists, at either the provincial or national level. The organizations which provide and/or certify the standards are also listed.

OCCUPATION	STANDARDS AVAILABLE FROM ACCOMMODATION SECTOR	CERTIFICATION BY
Campground Operator	PRIT, ATEC, STEC, MTEC, OTEC, CQRHT	
Director of sales & Marketing	ATEC	ATEC, STEC
* Front Desk Agent	PRIT, ATEC, STEC, MTEC, OTEC, CQRHT, TIANS, YTEC	PRIT, ATEC, STEC, MTEC, OTEC, TIANS, NWT
Guest Services Attendant (Bellhop)	ATEC	ATEC, STEC
* Hospitality Housekeeping Executive	HAC	HAC
Hostel Manager	Alberta Hostelling Association	
* Housekeeping Room Attendant	PRIT, ATEC, STEC, MTEC, OTEC, CQRHT, TIANS, TIAPEI, HNL, YTEC	PRIT, ATEC, STEC, MTEC, OTEC, TIANS, NWT
Human Resources Director	CQRHT	
* Room Division Executive	HAC	HAC
	FOOD SERVICE SECTOR	
* Advanced Foodservice Manager	CRFA	CRFA
Baker	APPRENTICE	ONT., B.C., A.B., N.S., Nfld.
Bartender	PRIT, ATEC, STEC, MTEC, OTEC, TIANS, YTEC, NWT	PRIT, ATEC, STEC, TIANS, YTEC, NWT
Beverage Services Manager	PRIT, ATEC, STEC, MTEC	ATEC, STEC, MTEC,
Catering Manager	PRIT, ATEC, STEC, MTEC, YTEC	
* Chef de Cuisine	CFCC	CFCC
* Cook	APPRENTICE	RED SEAL
Cook Helper	APPRENTICE	ONT.
Food & Beverage Server	PRIT, ATEC, STEC, MTEC, OTEC, CQRHT, TIANS, TIANB, TIAPEI, HNL, YTEC, NWT	PRIT, ATEC, STEC, MTEC, OTEC, TIANS, YTEC, NWT
Foodservice Executive		CFSEA
Foodservice Manager	CRFA	CRFA
Host/Hostess	ATEC, CQRHT	ATEC
* Kitchen Helper	PRIT, ATEC, STEC, CQRHT, TIANS, HNL, YTEC NWT	
Line Cook	PRIT, ATEC, STEC, MTEC	
Maitre D'	ATEC	ATEC
Pastry Cook	APPRENTICE	ONT.
Wine Steward	ATEC	ATEC
	ADVENTURE TOURISM/RECREATION SECTOR	
Freshwater Angling Guide	PRIT, ATEC, STEC, MTEC, OTEC	
Golf Manager	Grant MacEwan Comm. College (Alberta)	
Heritage Interpreter	PRIT, ATEC, STEC, MTEC, YTEC	
Hunting Guide	PRIT, ATEC, STEC, MTEC, YTEC, NWT	
Leisure Facilities Manager	Grant MacEwan Comm. College (Alberta)	
Lift Operator	PRIT, ATEC	
Marina Operator	OTEC	
* Outdoor Guide (Core Skills)	PRIT, ATEC, STEC, MTEC, OTEC, CQRHT, TIANS, TIANS, HNL, YTEC, NWT	NWT
Ski Area Guest Services Rep.	PRIT, ATEC	
Ski Area Retail Clerk	PRIT, ATEC	
Ski Area Supervisor	PRIT, ATEC, Alberta Vocational College	
Ski Patrol	PRIT, ATEC	
Ski Rental Shop Clerk/ Repair Shop Technician	Alberta Vocational College	
Slope Grooming Operator	PRIT, ATEC	
Snow Making Operator	PRIT, ATEC	
Supervisor Lift Operations	PRIT, ATEC	
	TRAVEL TRADE SECTOR	
Local Tour Guide	PRIT, ATEC, STEC, MTEC, TIANS, CQRHT	PRIT, ATEC, STEC, MTEC, TIANS
* Reservations Sales Agent	PRIT, ATEC, STEC, MTEC, OTEC, TIANS, YTEC	PRIT, ATEC, STEC, MTEC, TIANS
Tour Director	PRIT, ATEC, STEC, MTEC,	
Tour Operator	ATEC, TIANS	
* Travel Counsellor - Entry	ACCESS	
* Travel Counsellor - Senior	ACCESS	ACCESS
* Travel Manager	ACCESS	ACCESS
	EVENTS AND CONFERENCE SECTOR	
* Meeting Manager	MPICC	
* Meeting Planner	MPICC	
Special Events Coordinator	PRIT, ATEC, STEC, MTEC, OTEC, YTEC	ATEC, STEC, MTEC
Special Events Manager	PRIT, ATEC, STEC, MTEC, OTEC, YTEC	ATEC, STEC, MTEC
	TOURISM SERVICES SECTOR	
* Entry Level Skills (generic)	PRIT, ATEC, STEC, MTEC, OTEC, CQRHT, YTEC, NWT	
* Sales Manager	PRIT, ATEC, STEC, MTEC, OTEC, CQRHT, TIANS	ATEC, STEC, MTEC
* Tourism Small Business Operator	PRIT, ATEC, STEC, MTEC, OTEC, TIANS, YTEC	
* Tourism/Visitor Information Centre Supervisor	ATEC, STEC, OTEC, TIANS, TIAMB, TIAPEI, HNL	
* Tourism/Visitor Information Counsellor	PRIT, ATEC, STEC, MTEC, OTEC, TIANS, TIAMB, TIAPEI, HNL	PRIT, ATEC, STEC, MTEC, TIANS
	TRANSPORTATION SECTOR	
Taxicab Driver	PRIT, ATEC, STEC, MTEC, TIANS	ATEC, STEC

ACCESS	ACTA (Alliance of Canadian Travel Associations) - CITC (Canadian Institutes of Travel Counsellors) Canadian Educational Standards System
ATEC	Alberta Tourism Education Council
CFCC	Canadian Federation of Chefs and Cooks
CFSEA	Canadian Food Services Executives Association
CRFA	Canadian Restaurant & Foodservices Association
CQRHT	Conseil québécois des ressources humaines en tourisme
HAC	Hotel Association of Canada
HNL	Hospitality Newfoundland & Labrador
MPICC	Meeting Professionals International (Canadian Council)
MTEC	Manitoba Tourism Education Council
NWT	N.W.T. Tourism Training Group
OTEC	Ontario Tourism Education Corporation
PRIT	Pacific Rim Institute of Tourism
STEC	Saskatchewan Tourism Education Council
TIANB	Tourism Industry Association of New Brunswick
TIANS	Tourism Industry Association of Nova Scotia
TIAPEI	Tourism Industry Association of Prince Edward Island
YTEC	Yukon Tourism Education Council

* **NATIONAL**

APPENDIX E

DETAILED LABOUR FORCE DATA AND TABLES

Appendix E-1	Proportion Of Women By Occupational Classification
Appendix E-2	Proportion Of Accommodation Industry Workers Under 25—By Occupation
Appendix E-3	Proportion Of People With Less Than High School Education—By Occupation
Appendix E-4	Mother Tongue By Occupation
Appendix E-5	Number of Weeks Worked
Appendix E-6	Full-Time And Part-Time Work (1990)
Appendix E-7	Proportion Of Part-Time Workers By Occupation
Appendix E-8	COPS Description And Assumptions

APPENDIX E-1

PROPORTION OF WOMEN BY OCCUPATIONAL CLASSIFICATION

	% Women
Light duty cleaners	87
Receptionists	86
Executive housekeepers	86
Dry cleaners/Laundry	82
Front desk clerks	70
Food and beverage servers	69
Accounting clerks	60
Bartenders	59
Cooks	49
Accommodation managers	44
Restaurant managers	40
Kitchen /Food helpers	36
Chefs	13
Janitors	13
Canada (all occupations and industries)	45

Source: Statistics Canada, 1991 Census.

APPENDIX E-2

PROPORTION OF ACCOMMODATION INDUSTRY WORKERS BY AGE—BY OCCUPATION

	Under 25 Years (%)	25-44 Years (%)	45-64 Years (%)	Over 65 Years (%)
Kitchen/Food helpers	47	32	19	3
Receptionists	42	37	20	1
Front desk clerks	41	43	15	2
Food and beverage servers	39	47	14	1
Bartenders	26	57	16	1
Cooks	24	52	23	1
Janitors	23	42	33	3
Light duty cleaners	22	48	29	1
Accounting Clerks	19	60	18	3
Chefs	14	73	13	1
Restaurant managers	12	66	20	2
Dry cleaners/Laundry	12	46	40	2
Accommodation managers	7	50	39	4
Executive housekeepers	6	52	40	2
Canada (all occupations and industries)	17	55	26	2

Source: Statistics Canada, 1991 Census.

Note: Rows may not add due to rounding.

APPENDIX E-3**PROPORTION OF PEOPLE WITH LESS THAN HIGH SCHOOL EDUCATION—BY OCCUPATION**

	Percent
Dry cleaners/Laundry	60
Light duty cleaners	57
Kitchen/Food helpers	56
Janitors	46
Executive housekeepers	45
Cooks	42
Bartenders	41
Food and beverage servers	38
Accommodation managers	26
Receptionists	22
Restaurant managers	22
Front desk clerks	22
Chefs	15
Accounting clerks	14
Canada (all occupations and industries)	27

Source: Statistics Canada, 1991 Census.

APPENDIX E-4**MOTHER TONGUE BY OCCUPATION**

	% Neither English Nor French
Kitchen / Food helpers	31
Dry cleaners/Laundry	31
Light duty cleaners	2
Executive housekeepers	24
Cooks	23
Janitors	23
Chefs	22
Accommodation managers	18
Food and beverage servers	18
Restaurant managers	17
Accounting Clerks	16
Bartenders	12
Front Desk Clerks	11
Receptionists	7
Canada (all occupations and industries)	15

Source: Statistics Canada, 1991 Census.

APPENDIX E-5

NUMBER OF WEEKS WORKED: WORKED IN 1990

	<u>Total</u>		<u>Men</u>		<u>Women</u>	
	(#)	(%)	(#)	(%)	(#)	(%)
All Industries:						
1-26 weeks	1,753,915	13.9	862,505	12.4	891,415	15.8
27-48 weeks	2,450,295	19.4	1,299,270	18.6	1,150,995	20.4
49-52 weeks	<u>8,420,395</u>	<u>66.7</u>	<u>4,817,835</u>	<u>69.0</u>	<u>3,602,555</u>	<u>63.8</u>
	12,624,580	100.0	6,979,605	100.0	5,644,980	100.0
Accommodation Industry:						
1-26 weeks	40,365	24.1	15,180	21.8	25,190	25.8
27-48 weeks	39,165	23.4	15,395	22.1	23,765	24.4
49-52 weeks	<u>87,720</u>	<u>52.4</u>	<u>39,160</u>	<u>56.2</u>	<u>48,560</u>	<u>49.8</u>
	167,255	100.0	69,740	100.0	97,515	100.0
Hotels/Motels:						
1-26 weeks	29,730	21.4	10,195	18.0	19,535	23.7
27-48 weeks	33,060	23.8	12,645	22.3	20,410	24.7
49-52 weeks	<u>76,405</u>	<u>54.9</u>	<u>33,785</u>	<u>59.7</u>	<u>42,620</u>	<u>51.6</u>
	139,200	100.0	56,630	100.0	82,570	100.0
Other Accommodation:						
1-26 weeks	8,570	41.7	4,255	41.5	4,315	41.9
27-48 weeks	4,505	21.9	2,125	20.7	2,370	23.0
49-52 weeks	<u>7,480</u>	<u>36.4</u>	<u>3,865</u>	<u>37.7</u>	<u>3,610</u>	<u>35.0</u>
	20,555	100.0	10,255	100.0	10,305	100.0

Source: Statistics Canada, 1991 Census.

Note: Columns may not add due to rounding.

APPENDIX E-6

FULL-TIME AND PART-TIME WORK : WORKED IN 1990

	<u>Total</u>		<u>Men</u>		<u>Women</u>	
	(#)	(%)	(#)	(%)	(#)	(%)
All Industries:						
Part-Time	2,241,335	17.8	702,305	10.1	1,539,020	27.3
Full-Time	<u>10,383,250</u>	82.2	<u>6,277,305</u>	89.9	<u>4,105,945</u>	72.7
Total	12,624,580		6,979,605		5,644,980	
Accommodation Industry:						
Part-Time	40,510	24.2	12,995	18.6	27,510	28.2
Full-Time	<u>126,740</u>	75.8	<u>56,740</u>	81.4	<u>70,005</u>	71.8
Total	167,255		69,740		97,515	
Hotels, Motels:						
Part-Time	33,520	24.2	10,485	18.5	23,030	27.9
Full-Time	<u>105,675</u>	75.9	<u>46,140</u>	81.5	<u>59,535</u>	72.1
Total	139,200		56,630		82,570	
Other Accommodation:						
Part-Time	4,990	24.3	1,890	18.4	3,095	30.0
Full-Time	<u>15,565</u>	75.7	<u>8,355</u>	81.5	<u>7,200</u>	69.9
Total	20,555		10,255		10,305	

Source: Statistics Canada, 1991 Census.

Note: Columns may not add to totals due to rounding.

APPENDIX E-7

PROPORTION OF PART-TIME WORKERS BY OCCUPATION

	Part-Time Workers (%)
Kitchen/Food helpers	43
Food and beverage servers	39
Light duty cleaners	33
Bartenders	30
Receptionists	28
Front desk clerks	24
Dry cleaners/Laundry	20
Janitors	18
Cooks	15
Accounting clerks	9
Executive housekeepers	8
Accommodation managers	7
Restaurant managers	4
Chefs	3
Canada (all occupations and industries)	18

Source: Statistics Canada, 1991 Census.

APPENDIX E-8 COPS DESCRIPTION AND ASSUMPTIONS

A. Description of COPS

1. Definition

The Canadian Occupational Projection System (COPS) is a set of econometric models providing historical and projected data on the economy as a whole, population, industries, occupations, and so on. COPS is based on a large scale detailed econometric forecasting model developed by Informetrica Ltd. The model has both a demand and a supply side, and the demand side which projects employment has greater relevance here.

The demand side starts with a macroeconomic outlook and output projections from an econometric model. The model uses as inputs a myriad of domestic and international data such as population growth (immigration, fertility rates, etc.), world oil prices, economic growth in the U.S., U.S.-Canada exchange rates, U.S. housing starts, and so on. Part of the output of the model is a projection of real Gross Domestic Product (GDP) by industry, for each province.

The GDP projection is converted to an employment projection by applying output per worker/productivity ratios. Finally, an industry-occupation transformation matrix is used to give the occupation mix within each industry. The end result is a projection of employment by industry and occupation.

2. Approach and methodology

A four-step process involving both the Labour Force Survey (LFS) and COPS data was used to project employment growth in the industry:

- Base year 1993 LFS employment data were assembled for each of the two industrial classifications accommodation: (Major Group 91) and food and beverage (Major Group 92).
- Human Resources Development Canada (HRDC) carried out a COPS projection of employment to the years 2000 and 2005 for the aggregate industry (Major Group 91 plus 92, or COPS industry #64).
- The COPS growth rate was applied to the base year LFS employment for the aggregate of the two industries. This resulted in a projection of employment, on an LFS basis, of the two industries combined, for the years 2000 and 2005.
- This aggregate employment projection was segregated into its two constituent parts, based on the relative growth rates in LFS employment of the two industries over the 1984 to 1993 period. This latter exercise indicated that employment growth in the food and beverage industry was 3.7 times that of the accommodation industry over the historical period, on a compound annual basis.

B. Assumptions

The projections used in this study were based upon the growth rates embodied in the most recent COPS employment projections (1993), and some of their assumptions are provided in the following table.

Assumptions used by COPS for the 1993-2000 projections

Unemployment Rate	Declining from 11.4% to 10.0% by 2000
Consumer Price Index	2.3% growth annually
Population	1.3% growth annually
Gross Domestic Product	2.8% growth annually
U.S. Gross Domestic Product	2.6% growth annually
US \$ vis-à-vis Canadian \$	Canadian dollar = 79 U.S. cents in 1993 and 77 U.S. cents from 1994 to 2000
Cost of oil (barrel)	\$27.37 Canadian by 2000
Net Immigration	Declining from 195,000 in 1993 to 157,000 by 2000
Housing Starts	Increasing from 173,000 in 1993 to 202,000 in 2000
Labour Force Participation	66%

LISTING OF ACCOMMODATION AND TOURISM PROGRAMS AT CANADIAN EDUCATIONAL AND TRAINING INSTITUTIONS

Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
ALBERTA					
Keyano College (Clearwater)	F	C	CC	Pre-Employment Cook Certificate	25
Lethbridge Community College	T	C	CC	Travel and Tourism Certificate	42
Mount Royal College	T	C	CC	Travel Education Certificate	N/A
	T	C		Tour Management Certificate	N/A
Northern Alberta Institute of Technology	F	C	CC	Cooking Certificate	78
	F	C		Apprenticeship Cooking Periods 1,2, and 3 Certificate	228
	F	C		Culinary Arts Diploma/Certificate	78
Red Deer College	H	D	CC	Hospitality and Tourism Diploma	varies
	F	C		Food and Beverage Management Certificate	15
	H	C		Marketing and Rooms Division Management Certificate	25
Southern Alberta Institute of Technology	F	C	CC	Retail Meat Cutting Certificate	15
	F	D		Commercial Baking Diploma	34
	F	D		Professional Cooking Diploma	120
	H	D		Hotel and Restaurant Management Diploma	80
Career Development and Employment Apprenticeship	F	C	OE	Cook Apprenticeship Program Certificate	N/A
	F	C		Baker Apprenticeship Certificate	N/A
Edmonton Public Schools Continuing Education	F	C	OE	Food and Beverage Server Certificate Training Program	300
	F	C		Food and Hospitality Management Certificate	300

LEGEND

Industry Specification		Education Level	Institution Type
H = Hotel, lodging	C = Certificate	CC = Community College	OE = Other Educational Facilities
F = Food, Beverage, Culinary	D = Diploma	PC = Private College	U = University
T = Tourism	U = Undergraduate	UC = University College	FC = Collèges francophones
	G = Graduate	VC = Vocational College	OF = Autres maisons d'enseignement francophones
	S = Specialty Training Courses	CG = CEGEP	

Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
Lakeland College (Vermillion Campus)	F	C	PC	Commercial Cooking/Professional Cooking	N/A
	F	C		Short Order Cook Certificate	N/A
The Career College (Edmonton and Calgary)	T	D	PC	Travel and Tourism Diploma	N/A
University of Alberta			U	Bachelor of Arts	45
University of Calgary	T	U	U	Bachelor of Commerce, Concentration in Tourism Hosp. Mgt	60
	T	G		M.B.A., Concentration in Tourism & Hospitality Mgt.	125
	T	G		Ph.D. in Management, Specialization in Tourism and Hosp. Mgt	8
	T	C		Tourism and Hospitality Management Certificate	varies
Alberta Vocational Centre (Lesser Slave Lake)	F	C	VC	Pre-Employment Cook Trade Certificate	15
Alberta Vocational College (Calgary)	H	C	VC	Introduction to Supervision for Front Office Managers Cert.	open
	F	C		Introduction to Supervision for Executive	open
	F	C		Introduction to Supervision for Banquet	open
	H	C		Introduction to Supervision for Hotel Sales	open
	F	C		Bartending Certificate	40
Alberta Vocational College (Lac La Biche)	H	C	VC	Hotel and Restaurant Management	varies
Fine Art Bartending School (Edmonton)	F	C	VC	Bar Management Certificate	N/A
	F	C		Hospitality Programs	N/A
Fine Art Bartending School (Calgary)	F	C	VC	Professional Bartending	N/A
Fine Art Bartending School (Edmonton)	F	C	VC	Commercial Bartending Certificate	200
	F	C		Waiter/Waitressing Certificate	N/A

LEGEND

Industry Specification	Education Level	Institution Type
H = Hotel, Lodging	C = Certificate	CC = Community College
F = Food, Beverage, Culinary	D = Diploma	PC = Private College
T = Tourism	U = Undergraduate	UC = University College
	G = Graduate	VC = Vocational College
	S = Specialty Training Courses	CG = CEGEP
		OE = Other Educational Facilities
		U = University
		FC = Collèges francophones
		OF = Autres maisons d'enseignement francophones

Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
BRITISH COLUMBIA					
British Columbia Institute of Technology	T	D	CC	Tourism Management Diploma	50
Camosun College (Interurban Campus)	F	C	CC	Professional Cook Training Certificate	48
	T	C		Tourism Management Program (Certificate)	35
Camosun College (Lansdowne Campus)	H	D	CC	Hotel and Restaurant Administration Diploma	40
	T	C		Tourism Management Program (Certificate)	35
Capilano College	T	D	CC	Tourism Management Co-op Diploma Program	N/A
College of New Caledonia	F	C	CC	Professional Cook Training Certificate	N/A
East Kootenay Community College (Invermere)	T	C	CC	Tourism Hospitality Management Certificate	20
North Island College	T	C	CC	Tourism Career Entry Certificate Program	N/A
	H	C		Resort Management	N/A
	F	C		Professional Cook Training	N/A
Selkirk College	H	C	CC	International Resort Studies	N/A
	F	C		Professional Cook Training (Level I, II, III)	N/A
	H	C		Ski Resort Operation and Management	N/A
	H	C		Resort and Hotel Administration	N/A

LEGEND

Industry Specification	Education Level	Institution Type
H = Hotel, lodging	C = Certificate	CC = Community College
F = Food, Beverage, Culinary	D = Diploma	PC = Private College
T = Tourism	U = Undergraduate	UC = University College
	G = Graduate	VC = Vocational College
	S = Specialty Training Courses	CG = CEGEP
		OE = Other Educational Facilities
		U = University
		FC = Collèges francophones
		OF = Autres maisons d'enseignement francophones

Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
Vancouver Community College (City Centre)	F	C	CC	Baking and Pastry Arts Certificate	N/A
	F	C		Baking and Pastry Arts Apprentice	N/A
	F	C		Baking and Pastry Upgrade	N/A
	F	C		Baking Assistant ESL Certificate	N/A
	F	C		Culinary Arts Certificate	N/A
	F	C		Chinese Cuisine Certificate	varies
	F	C		Retail Meat Processing Certificate	N/A
	F	C		Sausage Making & Smoked Meats Certificate	N/A
	F	C		Culinary Arts Apprenticeship	N/A
	F	C		Dining Room and Lounge Service - Basic Certificate	N/A
	F	C		Food and Beverage Service (E.S.L.) Certificate	N/A
	F	C		Food and Beverage Management Certificate	N/A
	H	D		Hospitality Administration Diploma	N/A
	T	C		Tourism Professional Programs Certificate	N/A
	F	C		Vietnamese Cuisine Certificate	N/A
	F	C		Cooking (E.S.L.) Certificate	N/A
	F	C		Dining Room and Lounge Service - Advanced	N/A
	F	C		Retail Meat Cutting - Apprenticeship	N/A
			OE	Owner/Manager Development Program	360
				Front Line Certification (National Standards)	180
Hospitality Industry Education Advisory Committee	F			Serving It Right	4,000
	F			Foodsafe	N/A
Native Education Centre	T	C	OE	Native Tourism Development Program	N/A
Open Learning Agency	T	C	OE	Program for the Tourism Professional Supervisory Dvlpmnt.	N/A
Quanta Restaurant Systems	F	S	OE	Food Safe	N/A
Westec School of Bartending	F	S	OE	Professional Bartending Diploma	N/A
	F	S		Bartending Management Diploma	N/A
Burnaby College Ltd.	T	C	PC	Tourism Certificate Program	45
	H	D		Hotel Front Office Diploma Program	45

LEGEND

Industry Specification		Education Level	Institution Type
H = Hotel, Lodging	C = Certificate	CC = Community College	OE = Other Educational Facilities
F = Food, Beverage, Culinary	D = Diploma	PC = Private College	U = University
T = Tourism	U = Undergraduate	UC = University College	FC = Collèges francophones
	G = Graduate	VC = Vocational College	OF = Autres maisons d'enseignement francophones
	S = Specialty Training Courses	CG = CEGEP	

Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
Compu College School of Business	T	D	PC	Travel and Tourism Diploma Program	N/A
	H	D		Hospitality Management and Administration	N/A
	H	D		Hospitality Operations Management Diploma Program	N/A
	H	D		Hospitality Administration Diploma Program	N/A
Dubrulle French Culinary School	F	C	PC	Professional Culinary Training Diploma	198
	F	C		Professional Pastry & Dessert Training Diploma	198
McMillan College Inc.	F	S	PC	Food & Beverage Server Certification Program	N/A
TIPS Career College	H	C	PC	Hospitality Management Certificate/Diploma Program	30-40
Trend College	T	C	PC	Travel and Tourism Diploma Program	N/A
	T	C		Travel and Tourism Management Diploma Program	N/A
	H	C		Hospitality Operations & Management Diploma	N/A
	H	C		Hospitality Management Diploma	N/A
	H	C		Hospitality Operations Diploma	N/A
	T	C		Travel and Tourism Certificate	N/A
	H	C		Hospitality Operations Certificate	N/A
University of Victoria	T	U	U	Bachelor of Commerce Concentration Tourism Management	155
Malaspina University College	H	D	UC	Hospitality Management Diploma Program	30
	T	D		Tourism Management Diploma	25
	F	C		Baking-Commercial	N/A
Okanagan University College (Kelowna/Main)	F	C	UC	Cook Training	N/A
Okanagan University College (North Kelowna)	T	C	UC	Planning and Managing Events and Conferences	N/A
	T	C		Tourism Fundamentals Certificate	N/A
	T	C		Tourism Supervisory Development Certificate	N/A
	F	C		Cook Training (Offered at KLO and Kelowna Campuses)	N/A
Okanagan University College (Penticton)	F	C	UC	Bartending Certificate	N/A
Okanagan University College (Salmon Arm)	T	C	UC	Tourism Supervisory Development Certificate	12
	F	C		Bartending Certificate	N/A
Okanagan University College (Summerland)	F	C	UC	Bartending Certificate	N/A
	F	C	UC	Bartending Certificate	N/A

LEGEND

Industry Specification	Education Level	Institution Type
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Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
University College of the Cariboo	H	C	UC	Accommodation Management Certificate Program	5-10
	H	D		Events & Conventions Management Diploma Program	22
	F	C		Food and Beverage Management Certificate	5-10
	H	D		Resort/Hotel Management Diploma	22
	T	C		Tourism Supervisory Development Certificate	30
Fine Art Bartending School Vancouver	F	S	VC	Commercial Bartending	N/A
	F	S		Waiter/Waitress	N/A
	F	S		Bar Management	N/A
Northern Lights College	F	C	VC	Professional Cook Training Certificate	N/A
Tourism Training Institute (Main Campus)	H	S	VC	Events and Conference Management Certificate	20
	H	S		Hotel Front Office Management Diploma	40
	T	S		Japanese for Tourism Certificate	15
Tourism Training Institute (Surrey)	H	S	VC	Events and Conference Management Certificate	20
	H	S		Hotel Front Office Management Diploma	40
	T	S		Japanese for Tourism Certificate	15

LEGEND

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Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
MANITOBA					
Assinboine Community College	H	D	CC	Hospitality Tourism Administration Diploma	N/A
Keewatin Community College	F	C	CC	Professional Cooking Basics Certificate	24
Red River Community College	H	D	CC	Hotel & Restaurant Administration Diploma	70
	F	C		Commercial Cooking Certificate	56
	F	C		Chef Training Certificate	12
	T	C		Tourism Marketing and Management	N/A
	F	C		Commercial Baking Certificate	N/A
Manitoba Chamber of Commerce		Short	OE	Manitoba SuperHost Program	25-30
School of Cooperative Education-Seine River School Div.	H	C	OE	Hospitality Program (Certificate)	24

NEW BRUNSWICK

New Brunswick Community College (Moncton)	F	C	CC	Cook Trade Training/ Cook Apprenticeship	48
New Brunswick Community College (St. Andrews)	H	D	CC	Hospitality and Tourism Diploma	71
Collège communautaire du Nouveau-Brunswick Dieppe			FC	Accueil et service à la clientèle	N/A
Atlantic Business College Ltd.	H	C	PC	Hospitality and Tourism Diploma	40
Oulton's College	T	C	PC	Travel and Tourism Diploma	12-20

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Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
NEWFOUNDLAND					
Cabot College of Applied Arts, Technology and Cont. Ed.	F	D	CC	Food Administration Diploma	25
	H	C		Camp Attendant (Housekeeping and Construction) Certificate	N/A
	F	C		Bartending Certificate	30
	F	C		Commercial Cooking Certificate	30
	F	D		Food Administration Diploma	25
Central Newfoundland Regional College (Gander)	H	C	CC	Hospitality Services Certificate	N/A
	F	C		Basic Food Service and Accommodations Certificate	N/A
Eastern College of Applied Arts and Tech. (Bonavista)	F	C	CC	Catering/Housekeeping Attendant Certificate	N/A
Eastern College of Applied Arts, Tech. and Cont. Ed.	F	C	CC	Commercial Cooking Certificate	N/A
	F	C		Foods and Accommodation Certificate	N/A
Westviking College of Applied Arts and Technology	F	C	CC	Commercial Baking Certificate	N/A
	F	C		Commercial Cooking Certificate	N/A
	H	C		Hotel/Restaurant Operations Certificate	N/A
	H	D		Hotel/Restaurant Management Diploma	N/A
	H	C		Hotel/Restaurant Services Certificate	N/A
Compu College School of Business (St. John's)	H	C	OE	Hotel/Restaurant Operations Certificate	N/A
	T	C		Travel and Tourism Certificate	N/A
Hospitality Newfoundland and Labrador	H	S	OE	Customer Service Training Program	N/A
Newfoundland Career Academy	H	C	PC	Hotels and Hospitality Certificate	N/A
	T	C		Travel and Tourism Certificate	N/A

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NORTHWEST TERRITORIES					
Arctic College	T	C	CC	Tourism Management Certificate Program	N/A
NWT Tourism Training Group	H	C	OE	Parks and Camp Ground Training	N/A
	T	S		Train the Trainer - Tourism Services Sector	N/A
	T	C		Tourism Entry Program	N/A
	T	S		Tourism Management Certificate Program	N/A
	F	S		Kitchen Helper	N/A
	F	S		Waiter/Waitress Training	N/A
	F	S		Food and Beverage	N/A
NOVA SCOTIA					
Nova Scotia Community College	F	C	CC	Professional Cooking Certificate	64
	F	C		Retail Meatcutting Certificate	26
	F	C	CC	Cooking Certificate	20
Nova Scotia Community College (Halifax)	H	D		Hotel & Restaurant Management Diploma	30
	F	C		Food and Beverage Services Certificate	16
	F	C		Cooking Certificate	25
Nova Scotia Community College (Institute of Tech.)	F	D	CC	Food Service Technology Diploma	15
Nova Scotia Community College (Lunenburg)	H	D	CC	Hospitality Services Diploma	20
Nova Scotia Community College (Strait)	F	C	CC	Cooking Certificate	16
Atlantic Region Management Training Centre	H	D	OE	Special Events Diploma	varies
Mount Saint Vincent University	T	U	U	Bachelor of Tourism & Hospitality Management	40
University College of Cape Breton	H	D	UC	Hospitality Technology Diploma	50

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ONTARIO

Algonquin College	F	C	CC	Baker Certificate	10
	F	D		Culinary Management Diploma	40
	F	C		Cook Training Certificate	120
	H	D		Hotel and Restaurant Management Diploma	200
	F	C		Baking Techniques Certificate	20
	F	C		Retail Meatcutting Certificate	40
	F	C		Bartending Certificate	90
	F	C		Catering and Banquet Management Certificate	15
	H	C		Conventions and Meetings Management Certificate	50
	F	C		Cook Certificate	60
	H	D		Hospitality Administration Diploma	30
	H	C		Rooms Division Management Certificate	15
	F	C		Retail Meatcutter Certificate	5
	F	C		Sommelier Certificate	25
Cambrian College	F	C/D	CC	Food Production Basic and Advance Certificate/Diploma	N/A
	H	C/D		Hotel & Restaurant Management Certificate/Diploma	N/A
Canadore College of Applied Arts and Technology	F	D	CC	Culinary Management Diploma	30
	F	C		Food Preparation (Levels one and two) Certificate	20
	F	C		Baking Techniques Certificate (Basic and Advanced)	15
	H	D		Hotel, Resort & Restaurant Administration Diploma	50
	F	C		Retail Meat Cutting Certificate	15
	H	D		Hotel, Resort & Restaurant Management Diploma	50
Centennial College	H	D	CC	Hospitality and Tourism Administration Diploma	190
	H	C		Hospitality Services Certificate	30
Conestoga College of Applied Arts and Technology	F	D	CC	Food & Beverage Management Diploma	36
Confederation College	T	D	CC	Travel and Tourism Administration Diploma	N/A

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Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
Fanshawe College	T	D	CC	Tourism & Travel Counsellor Diploma	60
George Brown College of Applied Arts and Technology	H	D	CC	Hotel Management Diploma	220
	F	D		Food and Beverage Management Diploma	100
	F	D		Culinary Management Diploma	50
	F	C		Chef Pre-Employment Certificate	120
	F	C		Baking Apprenticeship Certificate	50
	F	C		Food Preparation Apprenticeship	250
	F	C		Patissier Certificate	25
	F	C		Sommelier Certificate	24
	F	C		Culinary Arts Italian Certificate	25
	F	C		Retail Meat Cutting Certificate	120
	F	C		Food Preparation Advanced Certificate	100
	F	C		Food Preparation Basic Certificate	190
	F	C		Baking Techniques Certificate	50
	F	C		Food Service and Bartending Certificate	85
	F	C		Chinese Cuisine Basic and Advanced Certificate	50
Georgian College of Applied Arts and Technology (Barrie)	T	D	CC	Tourism Management Diploma	50
	F	D		Culinary Management Diploma	50
	H	D		Hotel and Resort Operation Diploma	75-80
	H	D		Hotel and Resort Administration Diploma (Optional 3rd year)	30
Georgian College of Applied Arts and Technology (Owen Sound)	F	C	CC	Food Preparation Basic and Advanced	50

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Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
Humber College of Applied Arts and Technology (Lakeshore)	T	D	CC	Travel & Tourism Diploma	80
Humber College of Applied Arts and Technology (North)	H	D	CC	Hotel & Restaurant Management Diploma	N/A
	H	C		Ski Resort Operations Certificate	N/A
	F	C		Cuisine Apprentice Certificate	N/A
	T	D		Travel & Tourism Diploma	N/A
	F	C		Level Cook Certificate	N/A
	F	C		Food and Beverage Service Certificate	N/A
	H	D		Ski Area and Resort Management Diploma	N/A
Lambton College of Applied Arts and Technology	H	D	CC	Hospitality and Tourism Management Diploma	55-75
Loyalist College of Applied Arts and Technology	H	D	CC	Hotel & Restaurant Management Diploma	45
Saint Clair College of Applied Arts and Technology (South Cam.)	F	D	CC	Food and Beverage Service Management Diploma	30
Saint Lawrence College	H	D	CC	Hotel & Restaurant Management Diploma	40
Sault College of Applied Arts and Technology	H	D	CC	Hotel & Restaurant Management Diploma	30
	F	D		Food & Beverage Management Diploma	N/A
	F	C		Chef Training Certificate	36
Seneca College (Kings Campus)	T	D	CC	Tourism Industry Studies Diploma	150
Seneca College (Newnham Campus)	T	D	CC	Travel and Tourism Studies Diploma	200
Seneca College (Yorkdale Campus)	T	D	CC	Tourism Industry Studies Diploma	N/A
Sheridan College of Applied Arts and Technology (Oakville)	T	D	CC	Travel and Tourism Diploma	70
Sir Sanford Fleming College of Applied Arts and Technology	T		CC	Post Diploma Certificate in Ecotourism Management	60
St. Clair College of Applied Arts and Technology	H	D	CC	Hotel Management Diploma	30
	F	D		Culinary Arts Diploma	30

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Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
Niagara College of Applied Arts and Technology	F	D	CC/FC	Baking and Pastry Skills Diploma	20+
	F	D		Culinary Skills Diploma	65-70
	H	D		Hotel and Restaurant Administration Diploma	50-60
	F	C		Apprenticeship for Cook II	N/A
Canadian School of Management	T	C	OE	Certificate in Management (Tourism)	10-20
	T	C		Graduate in Management - Tourism/Hospitality	20-30
	T	D		Diploma in Tourism Management	10-20
Le Cordon Bleu Paris Cooking School	F	C/D	OE	Classic Cycle-Basic Cuisine (Certificate/Diploma)	150
	F	C/D		Classic Cycle-Intermediate Cuisine (Certificate/Diploma)	150
	F	C/D		Classic Cycle-Basic Pastry (Certificate/Diploma)	150
	F	C/D		Classic Cycle-Advanced Pastry (Certificate/Diploma)	150
	F	S		Intensive Sessions	N/A
	F	S		A Taste of Cordon Bleu: Christmas Candies	N/A
	F	S		A Taste of Cordon Bleu: Easter Celebration	N/A
	F	S		A Taste of Cordon Bleu: Cuisine du Terroir	N/A
	F	S		A Taste of Cordon Bleu: Menu de Pâques	N/A
	T	S	OE	Tourism Traineeship Program	N/A
Ontario Tourism Education Council					
Stratford Chefs School	F	D	OE	Enriched Apprenticeship for Basic & Advanced	35
				Cooking Diploma	
Constellation College of Hospitality		H	C	Hotel and Restaurant Operations	120

LEGEND

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	G = Graduate	OF = Autres maisons d'enseignement francophones
	S = Specialty Training Courses	
	CG = CEGEP	

Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
Ontario Business College	T	D	PC	Tourism and Hospitality Diploma	25
Ontario Business College (Belleville)	T	D	PC	Tourism and Hospitality Diploma	25
Ontario Business College (Oshawa)	T	D	PC	Tourism and Hospitality Diploma	25
Ontario Business College (Sudbury)	T	D	PC	Tourism and Hospitality Diploma	25
Ontario Business College (Thunder Bay)	T	D	PC	Tourism and Hospitality Diploma	25
Ontario Business College (Windsor)	T	D	PC	Tourism and Hospitality Diploma	25
Ontario Business College (North Bay)	T	D	PC	Tourism and Hospitality Diploma	25
Ryerson Polytechnic University	H	U	U	Hospitality and Tourism Management Degree	166
University of Guelph	H	U	U	Bachelor of Commerce - Hotel & Food Administration	125
	H	G	U	Management Science in Hospitality	N/A

PRINCE EDWARD ISLAND

Holland College	H	D	CC	Hospitality Management Diploma	25
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Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
QUÉBEC					
L'École provinciale d'hôtelière	H/F/T	D/U/G	CC	Techniques d'Hôtellerie, Restauration et Tourisme Dip	50-60
				Techniques culinaires degré/certificat	18
				Cuisinier degré/certificat	18
				Gestion d'Hôtellerie, Restauration et Tourisme Certif	15-20
				Service de table certificat	N/A
				Aide cuisiner certificat	N/A
				Hébergement certificat	N/A
				Entretien ménager certificat	N/A
				Sommellerie	N/A
				Introduction à la Mixologie	N/A
				Informatique	N/A
				Comptabilité I	N/A
				Communication et relations humaines I	N/A
				Langue seconde appliquée	N/A
				Mixologie certificat	N/A
				Oénologie	N/A
				Service au Guéridon certificat	N/A
				Organisation des banquets certificat	N/A
				Introduction au contrôle interne	N/A
				Compatabilité II certificat	N/A
				Communication et relations humaines II	N/A
				Langue seconde appliquée	N/A
				Cuisine	N/A
				Commis-garde-manger	N/A
				Commis entremétier	N/A
				Commis rôtiisseur	N/A
				Commis saucier	N/A
				Commis tournant	N/A
				Commis-pâtissier (A)	N/A
				Commis-pâtissier (B)	N/A

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	S = Specialty Training Courses	CG = CEGEP	CG = CEGEP		

Insitution Name	Specialization	Education Level	Institution Type	Program	Admit Number
				Garde-manger	N/A
				Entremétier	N/A
				Rôtisseur	N/A
				Saucier	N/A
				Tournant	N/A
				Alimentation rationnelle certificat	N/A
				Dîner gastronomiques certificat	N/A
				Cuisine chinoise certificat	N/A
				Cuisine italienne certificat	N/A
				Cuisine régionale certificat	N/A
				Fine cuisine aux fromages canadiens certificat	N/A
				Compétitions culinaires certificat	N/A
				Marketing	N/A
				Législation et droit hôtelier	N/A
				Communications et relations publiques	N/A
				Tourisme	N/A
				Gestion financière	N/A
				Contrôle de nourriture et boisson	N/A
				Gestion des ressources humaines	N/A
CEGEP De Matane	T	D/C	CG	Techniques De Tourisme -414.01 (diplôme et certificat)	40
CEGEP de Rivière-du-Loup	T	D	CG	Techniques d'intervention en loisir	N/A
Collège de Granby Haute-Yamaska	T	D	CG	Techniques de tourisme diplôme	50-60
Collège de Valleyfield	T	D	CG	Conseiller en Tourisme Extérieur	15-20
Collège Montmorency	T	D	CG	Techniques de Tourisme (DEC)	60
Centre D'informatique et de Bureautique en Liaison avec L'ent.	T	D	FV	Commercialisation Des Voyages (DEP)	80-100
Insitut de tourisme et d'hôtellerie du Québec	H/F/T		FV	Techniques de tourisme	80
				Techniques de gestion hôtelière	68

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Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
École hôtelière des Laurentides	H/F	D/C	OF	Boucherie	N/A
	H/F	D/C		Cuisine D'établissement	N/A
	H/F	D/C		Pâtisserie	N/A
	H/F	D/C		Réceptionniste bilingue en hôtellerie	N/A
	H/F	D/C		Service de la restauration	N/A
	H/F	D/C		Sommellerie	N/A
Lasalle College - School of Tourism and Hotel Mgmt.	H/F/T	D/C	PC	Tourism Diploma	130
Concordia University - Centre for Continuing Education	H/F/T	D/C		Hotel Management Diploma	200
	H/F/T	D/C		Food Service and Restaurant Management	75
	T	U	U	Hospitality Management Program (Certificate)	N/A
McGill University	T	U		Tourism Program (Certificate)	N/A
CEGEP Champlain ¹	H/F/T	D/C	U	Diploma in Management (Tourism)	25
Collège Merici ¹	H/F/T	D/C	CG	???	???
Commissions Scolaire ¹	H/T	D/C	???	???	???
Université du Québec à Montréal ¹	H/T	D/C	???	???	???
International School of Tourism	H	U/G	U	Bachelor of Business Administration — Hotel & Tourism	125
		D	P/C	Certificate of Hotel and Restaurant Management	30
				Ultimate Guest Service Program - International Concierge - Institute	N/A

¹ As per L'Association des Hôteliers de la Province de Québec

LEGEND

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Institution Name	Specialization	Education Level	Institution Type	Program	Admit Number
SASKATCHEWAN					
Carlton Trail Regional College	H	C	CC	Hospitality Certificate	12
Northwest Regional College	T	S	CC	TISASK Host II	40
Prairie West Regional College	H	C	CC	Hotel and Restaurant Management Certificate	12
Saskatchewan Institute of Applied Arts and Technology	F	C	CC	Commercial Cooking/Professional Cooking Certificate	N/A
	F	C		Short Order Cook Certificate	N/A
	H	D		Hotel and Restaurant Administration Diploma	N/A
	F	C		Professional Cooking Certificate	30
Parkland Regional College	F	C	OE	Professional Cooking	N/A
	F	C		Retail Meat Cutting Certificate	N/A
Fine Art Bartending School (Regina)	F	S	VC	Professional Bartending	N/A

Source For Institute Name and Program: Canadian Tourism Human Resource Council
List is not intended to be exhaustive and may be out of date

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	S = Specialty Training Courses		CG = CEGEP	

APPENDIX G

HOTEL ASSOCIATIONS

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APPENDIX H

TOURISM EDUCATION COUNCILS

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APPENDIX I

STUDY TEAM

This project was completed by a consortium of firms—KPMG, Mana Research Limited, and Abt Associates of Canada. A brief profile of each firm is provided below:

KPMG is Canada's largest professional service organization. Comprising KPMG Management Consulting and KPMG Peat Marwick Thorne, chartered accountants, the firm has 5,000 personnel in over 70 locations across the country. KPMG delivers a complete range of audit, consulting, financial advisory and tax services to business, public sector and services organization, with a global network of over 800 offices in more than 130 countries. (Contact person: Lyle Hall, Partner, KPMG Management Consulting, 33rd Floor, Commerce Court West, Toronto, Ontario, M5L 1B2 Telephone: (416) 777-8500; Facsimile (416) 777-3515).

Mana Research Limited is a Vancouver-based firm, whose president, Marilyn Mohan, has many years experience in analyzing employment and demographic characteristics of the labour force. Dr. Mohan has been responsible for each of the important studies on the tourism labour market carried out in Canada in the last four years. (Contact person: Dr. Marilyn Mohan, President, Mana Research Ltd., 4640 W. 13th Ave., Vancouver, B.C., V6R 2V7. Telephone/Facsimile (604) 224-5494).

Abt Associates of Canada specializes in high quality applied social research. The firm's work has taken two main directions: meeting clients' needs for social research findings for policy development and providing balanced assessments through formal program evaluations. (Contact person: David Hoffman, Vice-President, Abt Associates of Canada, Place de Ville, Tower "B", Suite 2010A, 112 Kent St., Ottawa, Ontario K1P 5P2. Tel: (613) 230-4539).

Project team members

The following individuals were actively involved in the completion of the project in the roles indicated:

KPMG

- Lyle Hall (overall project administrator, involved in all phases).
- Manlio Marescotti (Steering Committee meeting, literature review, interviews, case studies, report writing).
- Ralph Mackey (Steering Committee meetings, interviews, focus groups).
- Suzanne Liska (interviews, focus groups, case studies).
- Marie-Hélène Beauchesne (interviews, focus groups).
- Wayne Camenzuli - Adelaide office (Australian case study).

Mana Research Ltd.

- Marilyn Mohan (Steering Committee meeting, labour force analysis).

Abt Associates of Canada

- David Hoffman (interview protocols, general guidance and advice).
- Chantal Paquette (interviews, focus groups, case studies).

GLOSSARY

Accommodation industry

Described as Major Group 91 in the Standard Industrial Classification System. Consists of four major sub-categories, of which the "hotels, motels and tourist courts" category is the most significant, accounting for three-quarters of employment and economic activity.

References in the report to the accommodation industry are representative of the Major Group 91 except where differences between sub-categories are identified.

Average room rate

Calculated by dividing room revenue by room nights occupied. Occupancy and average room rate are the two major indicators of a hotel/motel's operating performance.

Business travel

One of two major categories used to define travel purpose—the other major category is leisure (pleasure) travel.

Central reservation system (CRS)

A chain's CRS system can be used to make reservations at any hotel in the chain. The CRS is accessed through the "800" telephone number or by an airline reservation system (e.g., Sabre).

Chain

A chain can operate as a management company, franchiser, or combination thereof. As a franchiser, a chain generally offers an identification package, reservation system and support materials (e.g., accounting package). As a management company, the chain is engaged by the owner to provide full on-site management. A management company may operate one brand exclusively (e.g., manage under their chain name) or operate several brands (e.g., Commonwealth Hospitality manages Holiday Inns and Ramada).

Education

Formal in-school learning experience, the successful completion of which results in a degree or certificate. In this study, education is further defined as post-high school and focused on the accommodation industry or related field.

Food & beverage operation

Food & beverage operation in a hotel/motel includes restaurants, banquets, catering, and room service

Full-service hotel/motel

Hotel/motel that has a food & beverage operation and, usually, meeting and recreation facilities.

Gross Domestic Product

Value of goods and services produced by a specific industry sector.

In-house training

Training done on the hotel premises and includes "classroom" training and on-the-job training. The training material can be either proprietary or from third parties.

Independent operation

Establishment not affiliated with a hotel chain. Many small operations are owner-managed.

Leisure (pleasure) travel

One of two major categories used to define travel purpose—the other major category is business travel.

Limited-service hotel/motel

Hotel/motel that offers only guest rooms and does not have a restaurant on-site. The hotel may provide limited meeting and recreational facilities.

Multi-skilling

Providing employees with the skills (through training) to perform more than one job function. Frequently, multi-skilling is done in one area—for example, an employee in the Rooms Division may be trained to work as a bellperson, front desk clerk and reservation agent.

Occupancy rate

Calculated by dividing the room nights occupied by room nights available. Occupancy and average room rate are the two major indicators of a hotel/motel's operating performance.

Training

Denotes a variety of on-the-job, off-site and institutional training and/or education conducted on a task-by-task or subject basis.

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